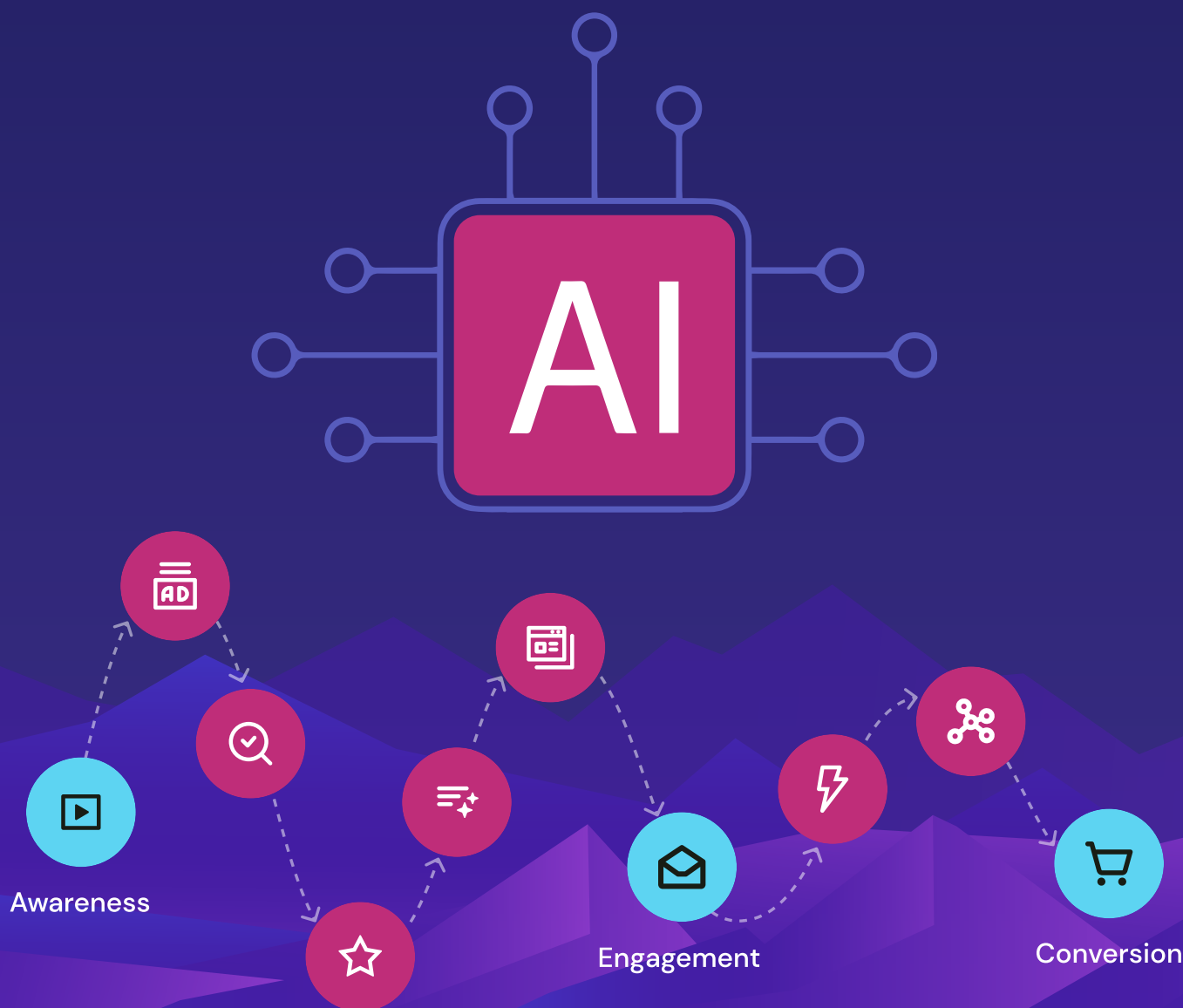


How AI is Reshaping Customer Journeys





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Introduction

AI is becoming a standard part of how consumers navigate and purchase online, part of a diverse ecosystem of platforms, which consumers switch between. In a single session, a user might move between AI assistants, search engines, social platforms, ecommerce sites, online communities, and brand websites.

To understand how AI is changing customer behavior, we analyzed real-world consumer journeys alongside clickstream and market data. Our goal was to understand where AI appears in the journey, how it influences decisions, and whether its role is expanding beyond research into commercially meaningful moments.

Executive summary

This report draws on Semrush Journeys data, and Datos panel data to understand how AI and search interact and are reshaping customer journeys across industries.

We analyzed consumer behavior across categories including consumer electronics, healthcare, beauty, automotive, SaaS, luxury goods, and ecommerce.

This report explores these key themes:

- How AI is becoming a natural part of customer journeys across industries
- How AI is changing the way consumers evaluate options and make decisions
- How AI participation is extending deeper into purchase journeys and commercial outcomes
- Emerging trends in AI adoption, engagement, referrals, and ecommerce behavior across the US, UK, and EU*

In addition, this report features expert commentary from the following three domain experts to provide broader context:



Edward Sturm

SEO and marketing expert at [Edwardsturm.com](https://edwardsturm.com)



Philip Armstrong

Chief Data Officer at Truth in Data & Consultant at Semrush



Eli Goodman

President at Datos & VP Product Sales at Semrush

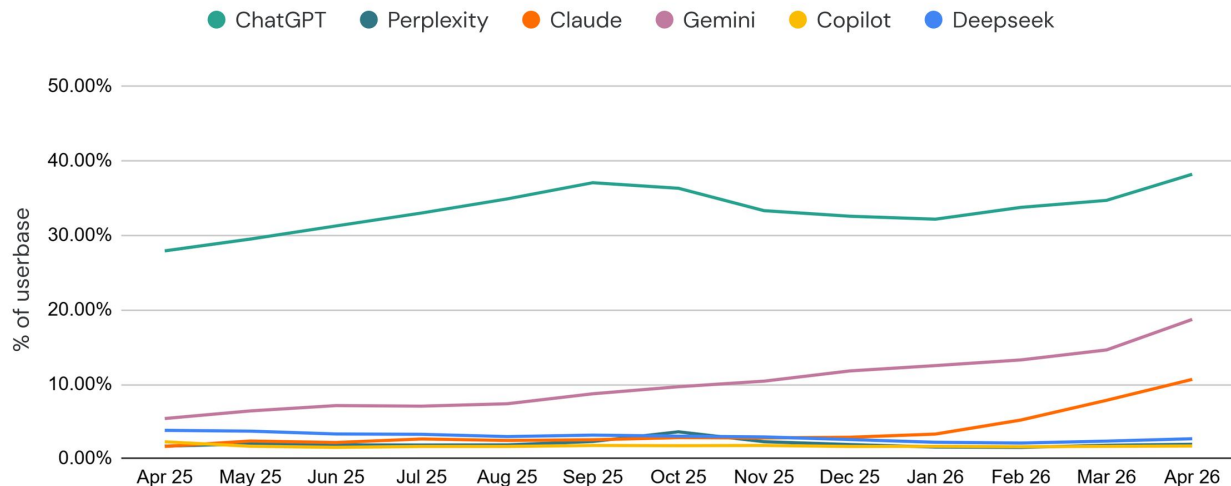
The countries included in this study: Belgium, Greece, Lithuania, Portugal, Bulgaria, Spain, Luxembourg, Romania, Czechia, France, Hungary, Slovenia, Denmark, Croatia, Malta, Slovakia, Germany, Italy, Netherlands, Finland, Estonia, Cyprus, Austria, Sweden, Ireland, Latvia, Poland, Iceland, Norway, Liechtenstein, Switzerland, United Kingdom, United States.



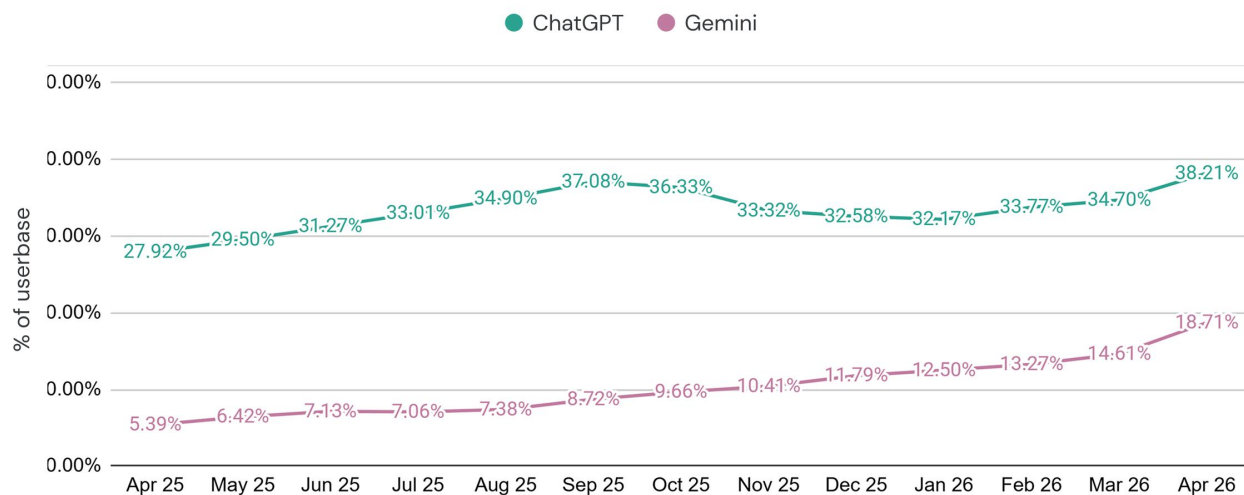
AI is becoming a part of customer journeys

Across both the US and Europe, AI usage continues to rise. Among desktop users who use AI assistants, ChatGPT remains the most-used platform, reaching roughly 44% usage share in the EU and UK and roughly 38% in the US by April 2026. However, its lead is narrowing. Gemini has grown rapidly, roughly tripling over the period analyzed to reach about 21% in the EU and UK and about 19% in the US, while Claude surged later in the period.

Share of desktop users using AI in the US



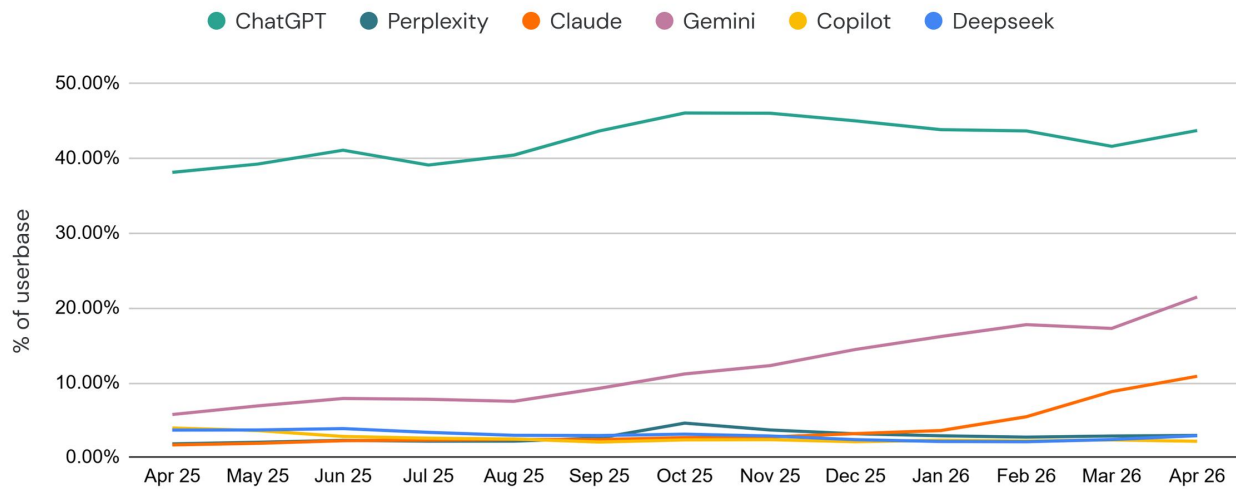
Share of desktop users using AI in the US



Monthly % of userbase = $\frac{\text{Number of unique users visiting the domain's webpages (monthly) at least once}}{\text{Total number of unique panel users (monthly)}} \times 100\%$



Share of desktop users using AI in the EU & UK



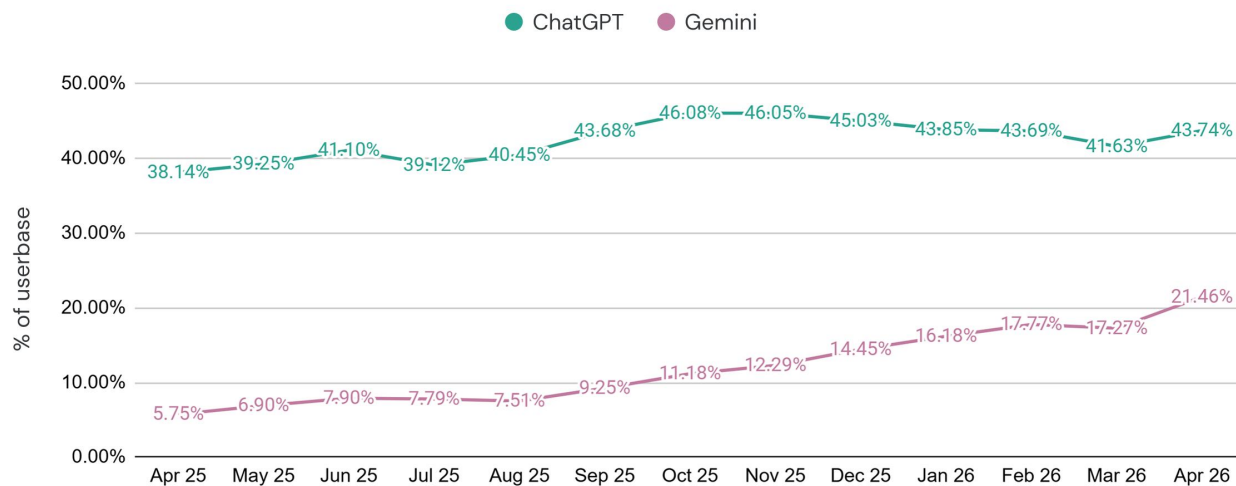
Monthly % of userbase = Number of unique users visiting the domain's webpages (monthly) at least once / Total number of unique panel users (monthly) * 100%



Source: Datos



Share of desktop users using AI in the EU & UK



Monthly % of userbase = Number of unique users visiting the domain's webpages (monthly) at least once / Total number of unique panel users (monthly) * 100%



Source: Datos

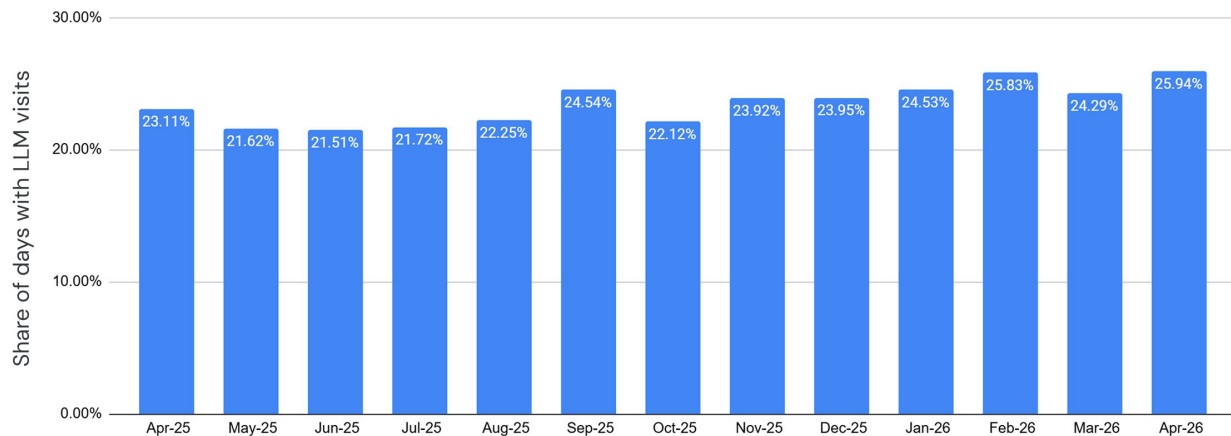




This matters because AI adoption is no longer concentrated around a single assistant. Consumers are beginning to move across multiple AI platforms, much as they already move across multiple search engines, social platforms, marketplaces, and publisher sites.

Among AI users, engagement frequency continues to rise, with users interacting with AI on ~1 in 4 days per month (~26–27% EU, ~26% US).

Percentage of days in a month with LLM usage, US



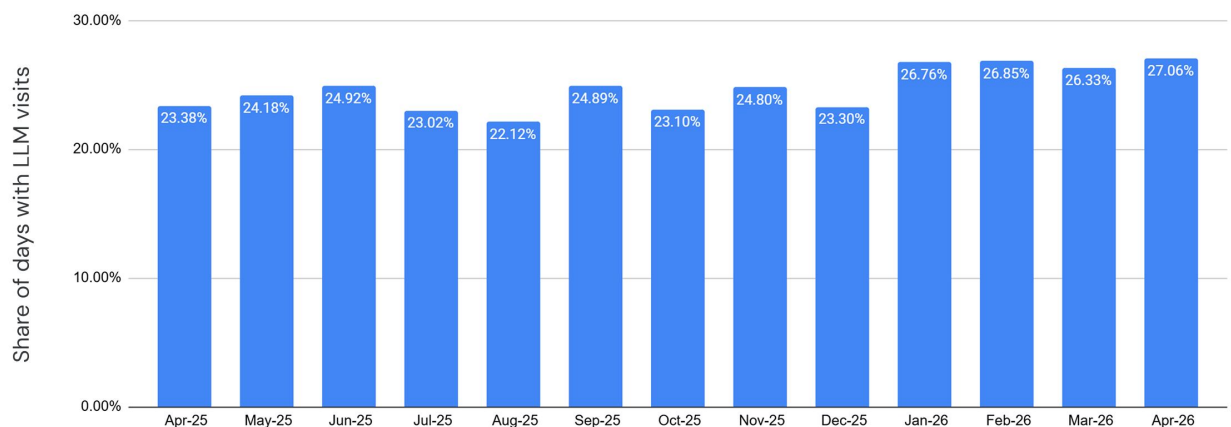
Share of days with LLM visits = Average number of days with LLM activity among users who used an LLM at least once during the month / Number of days in the month * 100%



Source: Datos



Percentage of days in a month with LLM usage, EU & UK



Share of days with LLM visits = Average number of days with LLM activity among users who used an LLM at least once during the month / Number of days in the month * 100%



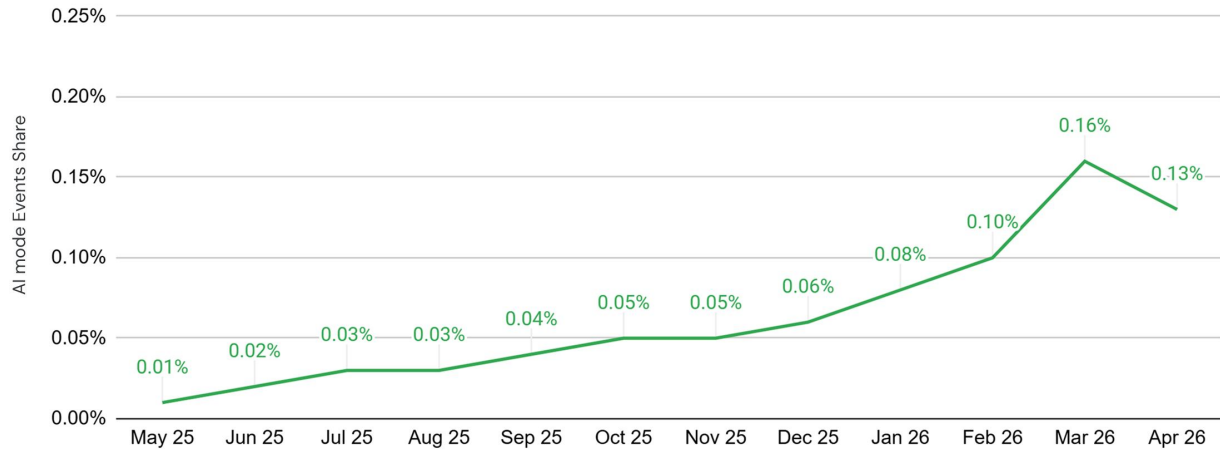
Source: Datos





Google is also making progress in bringing AI experiences directly into its existing ecosystem. Although Google AI Mode remains relatively small today, adoption has increased steadily across both regions.

Google AI Mode visits in the US



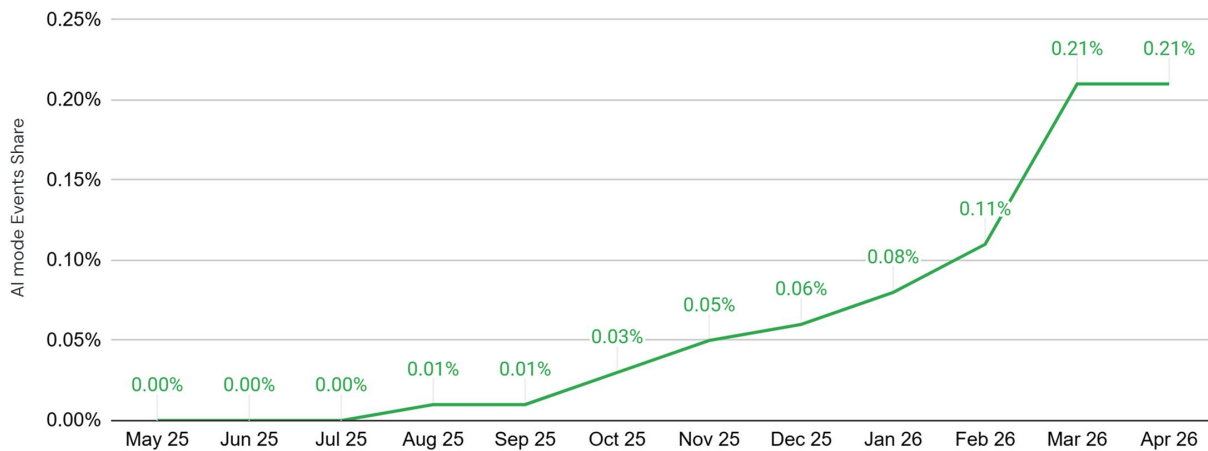
Monthly AI mode Events Share (%) = Monthly visits to AI mode's webpages / Total monthly webpage visits across entire panel * 100



Source: Datos



Google AI Mode visits in EU & UK



Monthly AI mode Events Share (%) = Monthly visits to AI mode's webpages / Total monthly webpage visits across entire panel * 100



Source: Datos





Eli's Take

Eli Goodman
President of Datos & VP Product Sales at Semrush



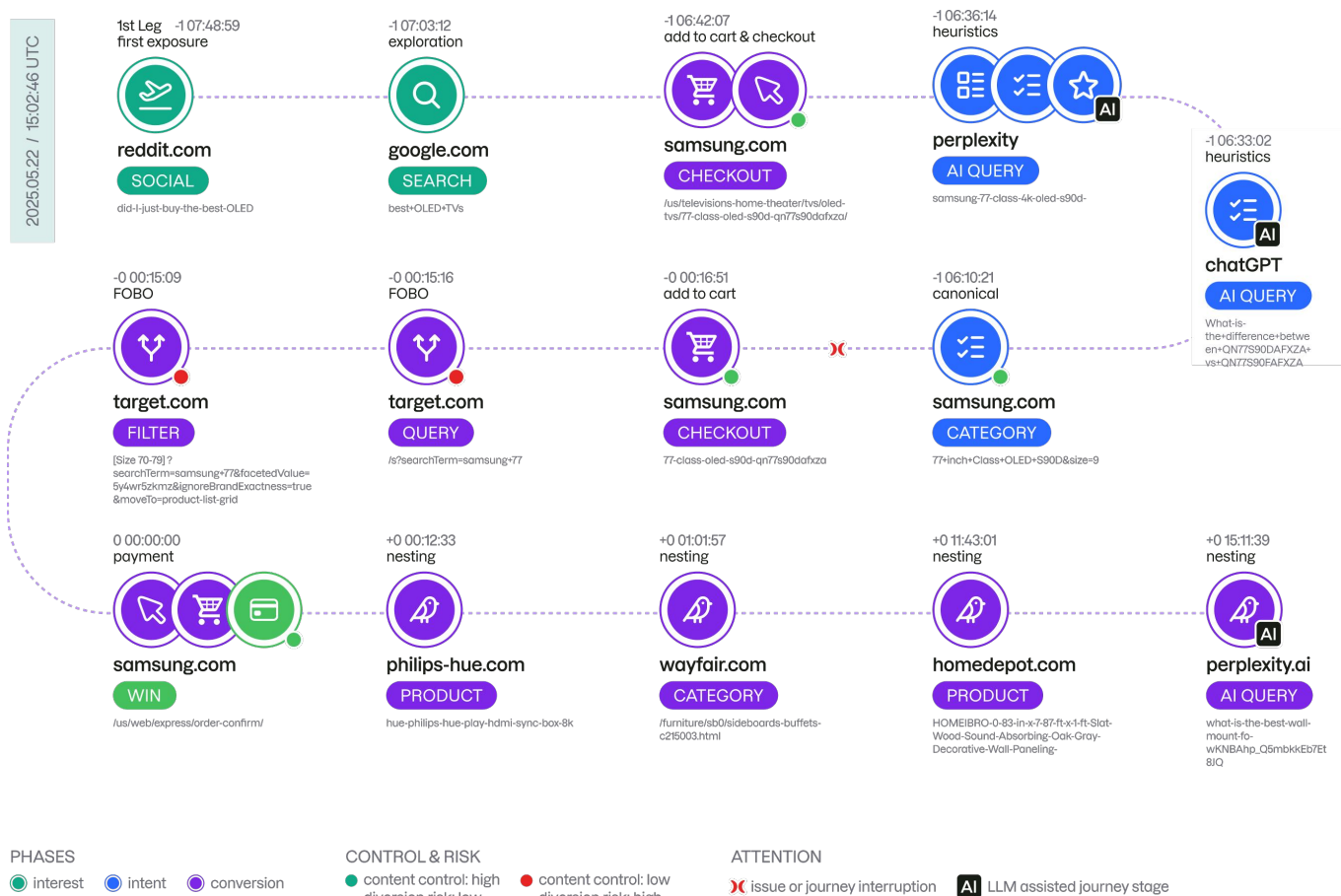
It will be really interesting to see how these numbers change in the coming months after Google's AI Mode announcement in May. Rumors swirled that Google was preparing to make AI Mode the default experience, but we'll need time for the dust to settle and the data to tell the real story. As always, the challenge is separating hype from measurable changes in consumer behavior.

AI is no longer an isolated tool used occasionally for experimentation. Across industries, AI increasingly appears as a natural part of customer journeys.

The Samsung TV journey below illustrates this shift. The customer begins with traditional sources of inspiration and research, including Reddit and Google, before moving into product evaluation, comparison, and ultimately purchase.

AI appears naturally within this process, alongside search engines, retailer websites, and brand-owned properties.

Samsung TV journey



*Leg: A major turning point where a buyer changes their mind, switches platforms, or checks out a competitor. These numbered markers highlight the exact places like Reddit, TikTok, or ChatGPT, where your brand needs to be highly visible to save the sale.



AI participates early

One of the most notable aspects of this journey is how early AI appears. Before finalizing the purchase decision, the customer consults both Perplexity and ChatGPT as part of the evaluation process.

Rather than serving as a final destination, AI becomes another touchpoint alongside search engines, retailer websites, and brand-owned properties.

Philip's Take

Philip Armstrong
Chief Data Officer at Truth in Data & Consultant at Semrush



The fundamental difference between current state of search and AI is that AI anticipates the ultimate intent, whereas search would surface third party reviews, links to specs and ads.

AI creates a decision-making framework, fills in the respective specs, and passes judgement. What have been three discrete research steps for a human are now shortcut by AI.

AI builds decision-making frameworks

AI plays a particularly important role in helping the customer evaluate the product.

Rather than researching individual specifications one at a time, the customer uses both ChatGPT and Perplexity to assess the television against a broader set of purchase criteria. In a single interaction, AI helps establish a decision-making framework, evaluating factors such as picture quality, refresh rate, brightness, and other product characteristics.

This represents a different mode of product research. Instead of simply retrieving information, AI helps organize and interpret it.

AI shapes product understanding

The journey also highlights the growing influence AI can have on consumer perceptions.

In this journey, Perplexity's evaluation appears to rely on a limited set of heuristics. This resulted in the Samsung TV receiving a failing score for "Brightness", even though independent testing rated it significantly brighter than a competing model, which received a passing score.

This misrepresentation is a clear example of AI drift in action, demonstrating why brands need visibility into how LLMs represent their products as AI-powered discovery becomes a mainstream consumer behavior.

AI appears alongside search and ecommerce

Perhaps the most important takeaway is that AI does not operate in isolation.

Throughout the journey, the customer moves between Reddit, Google, Samsung.com, Perplexity, ChatGPT, retailers, and home décor sites while researching both the television itself and products associated with the purchase.

AI is not replacing traditional channels; rather, it is becoming part of the broader decision ecosystem.

**Edward's Take**

Edward Sturm
SEO and marketing expert at edwardsturm.com



There is so much to learn from this customer journey. Some huge takeaways:

1. Optimize for high-intent language and reviews across platforms. You want to show up when searchers are looking to get/use something or call somebody. Then it's clear that searchers are going to AI for due diligence. You need a wealth of reviews out there for the AI to find. Syndicating reviews across owned channels on UGC platforms works very well to cover SERPs for Brand + Review searches.
2. You want your high-intent pages to explain what your product is while still selling it. You want to avoid losing the sale by potential customers leaving your page to learn about something talked about on it. Look at the data to see what potential customers are confused about and explain that on your landing pages so they get everything they need and can check out smoothly.

AI is reshaping how decisions are made

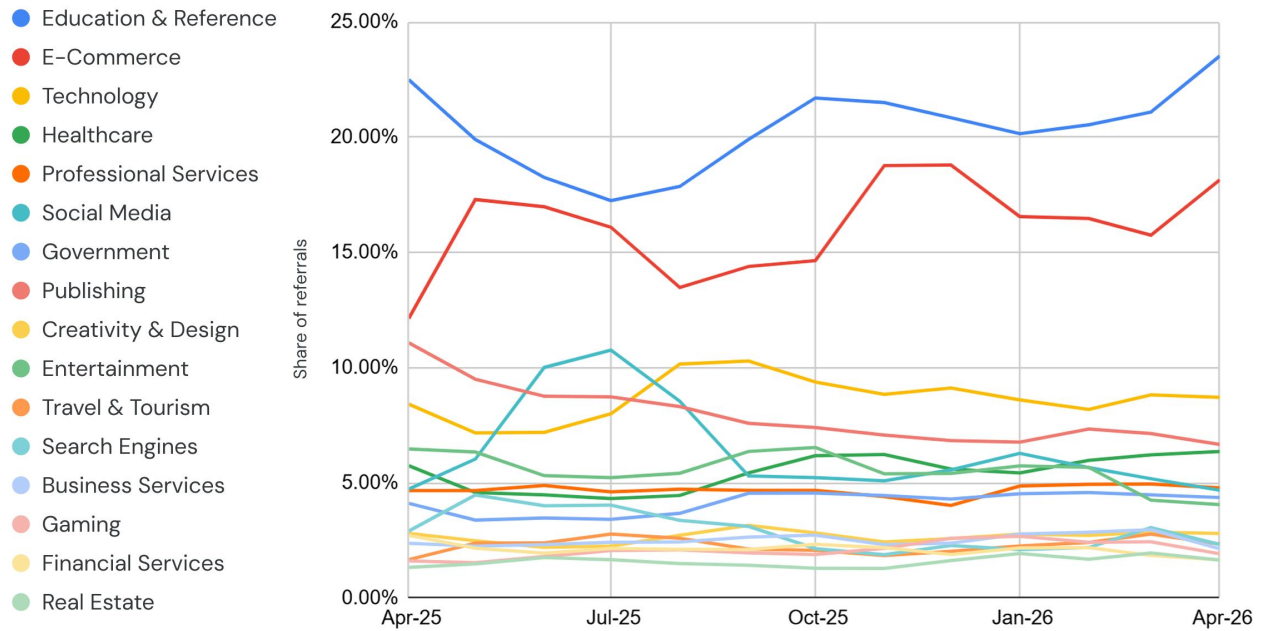
The most important shift is not that consumers use AI more, but that it is becoming embedded in buyers' decision-making processes.

Across both the US and Europe, E-commerce has rapidly gained ground as one of the largest destinations for traffic originating from AI assistants.

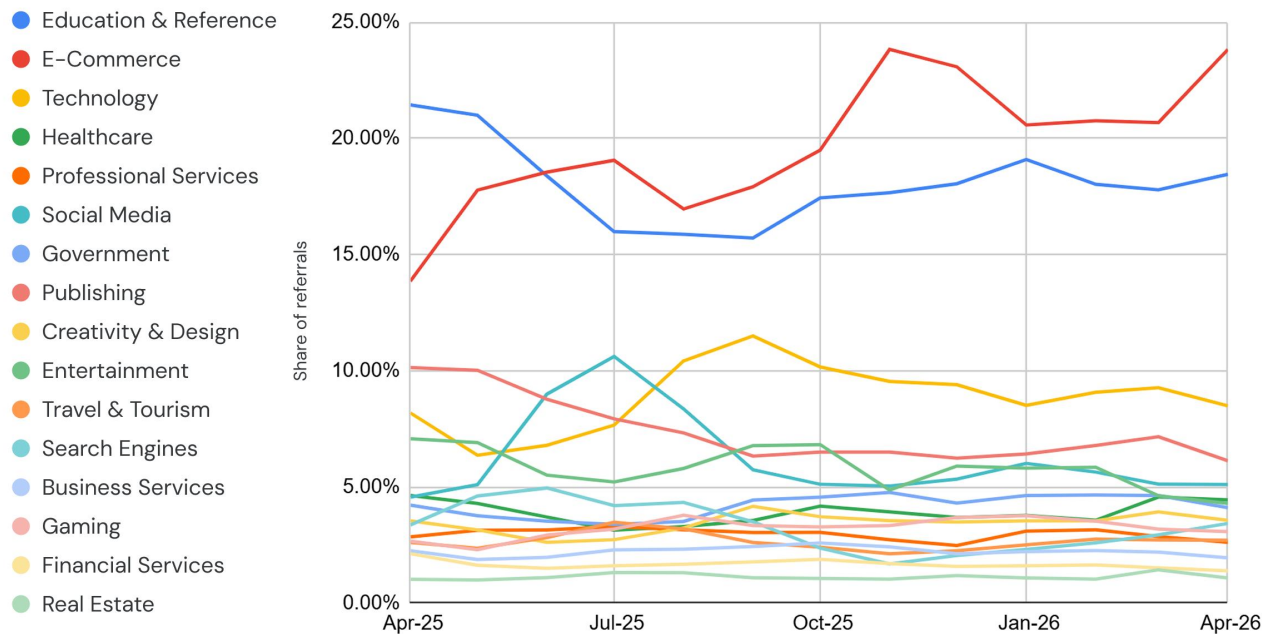
In Europe, E-commerce has overtaken Education & Reference as the largest referral category, accounting for nearly a quarter of all AI referrals. In the US, E-commerce ranks second only to Education & Reference and maintains a substantial lead over every other category.



Share of ChatGPT referral domain types, USA



Share of ChatGPT referral domain types, EU & UK

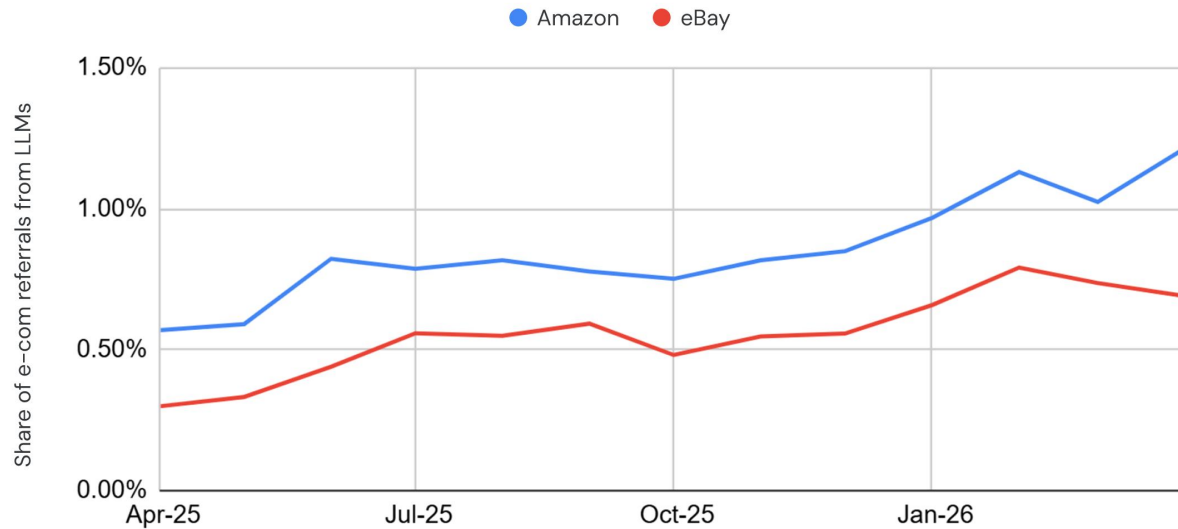


Share of ChatGPT referrals to a domain category = $\frac{\text{Number of referrals from ChatGPT to a specific domain category}}{\text{Total number of referrals from ChatGPT}} \times 100\%$

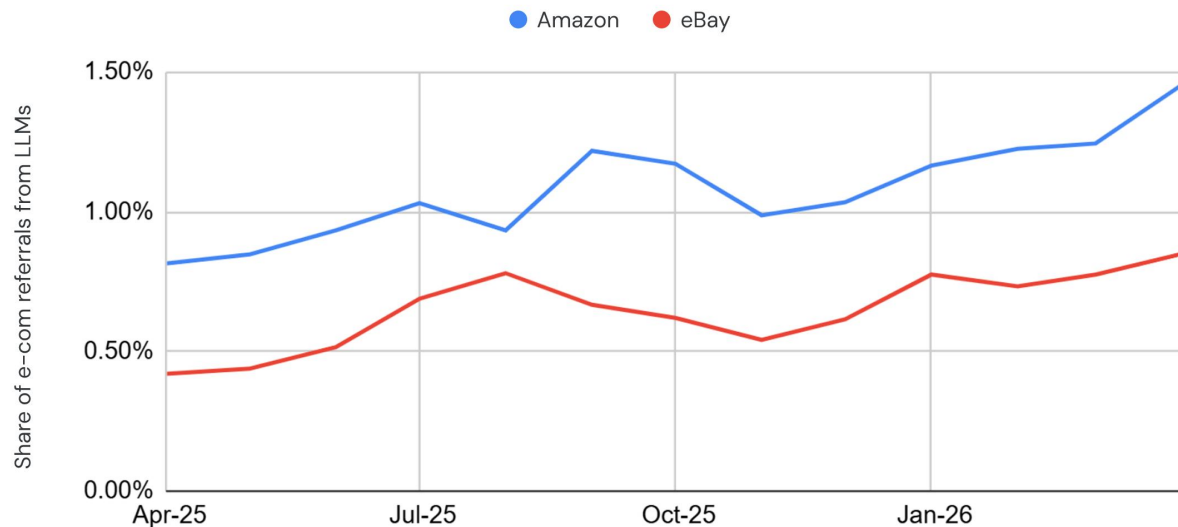


The trend is also visible in referral traffic to major retailers. Across both regions, referrals from LLMs to E-commerce platforms Amazon and eBay have grown over the past year.

Share (of clicks per user) of e-commerce referrals from LLMs per month, US



Share (of clicks per user) of e-commerce referrals from LLMs per month, EU & UK



Share of e-com referrals from LLMs = Sessions where the first e-commerce visit came from an LLM / Sessions with at least one e-commerce visit * 100%



Rather than acting solely as an answer engine, AI is increasingly functioning as a decision-support and e-commerce referral layer. Consumers use AI to narrow choices, compare alternatives, build confidence, and even to navigate directly to retailers.

Edward's Take**Edward Sturm**SEO and marketing expert at edwardsturm.com

Versus/Alternatives pages are doing very well with AI. Create pages targeting Competitor + Alternative. Above the fold, give a quick explanation of how your brand is a great alternative to your target competitor. Make your first H2 a comparison table. Visitors like comparison tables because they make differences and advantages easy to see. They're also frequently cited by LLMs because they give concrete, extractable facts. By creating the table yourself, you control the positioning, shape the narrative, and make sure the data about your brand is accurate.

The Wegovy customer journey illustrates how AI is increasingly becoming part of consumer decision-making, particularly in categories where purchases involve significant cost, risk, and personal consequences.

Unlike traditional product searches, consumers evaluating GLP-1 treatments are not simply comparing brands. They are assessing side effects, effectiveness, convenience, affordability, and long-term commitment. These decisions require consumers to evaluate multiple tradeoffs rather than identify a single "best" option.

Eli's Take**Eli Goodman**

President of Datos & VP Product Sales at Semrush



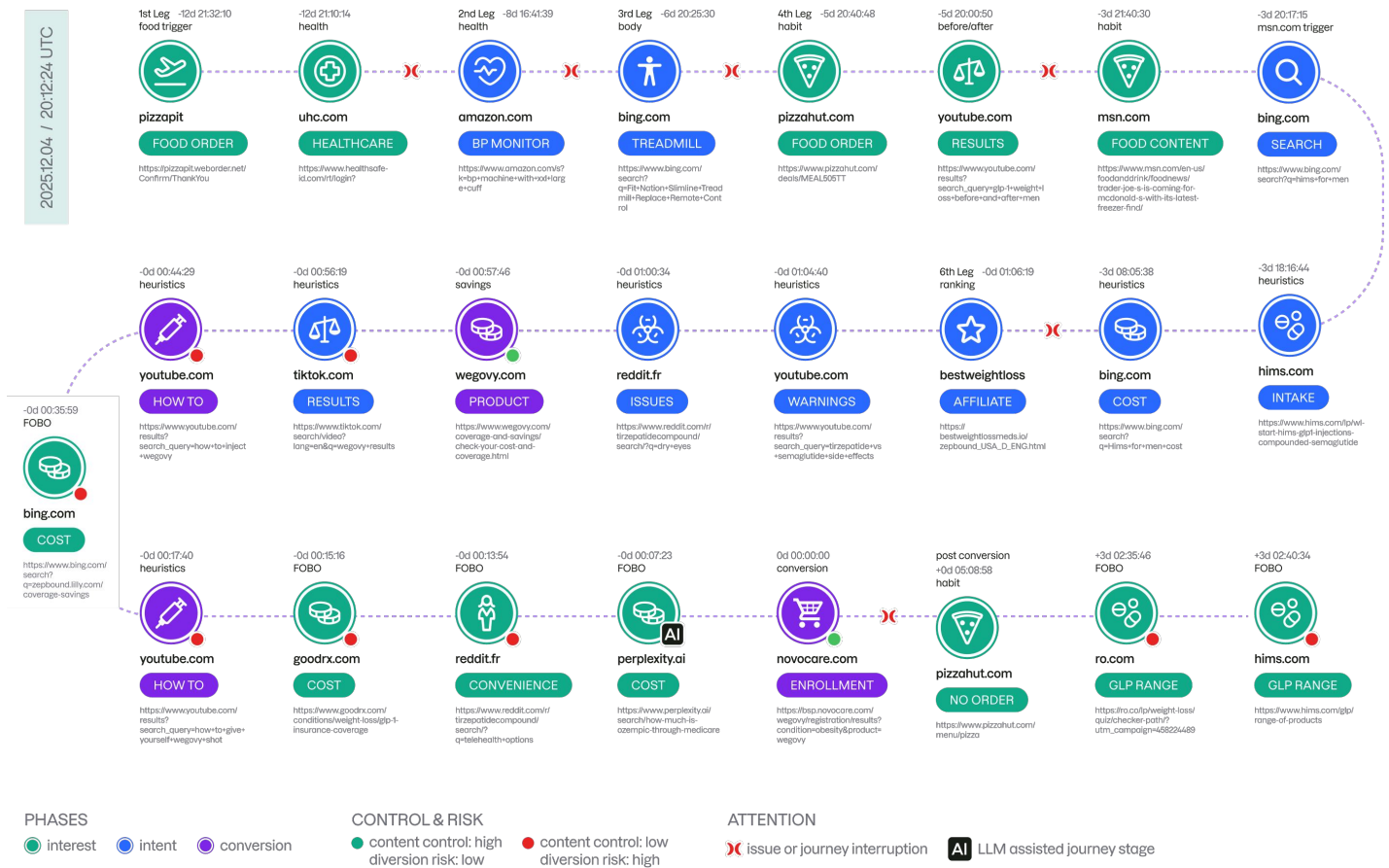
Although I could spend hours deconstructing the decision making process around something as impactful as the decision to start a weight loss journey, the key takeaway here is the journey is not a linear one. The triggers that start the journey and the behaviors that follow are complex, but do contain discernible patterns when the right analysis techniques are applied.

Edward's Take**Edward Sturm**SEO and marketing expert at edwardsturm.com

In YMYL ("your money or your life") niches like this, it's even more important to ensure accurate information about your brand appears on your website, on your high-intent pages and FAQ pages, and across your social media channels.



Wegovy (Ozempic) Journey



*Leg: A major turning point where a buyer changes their mind, switches platforms, or checks out a competitor. These numbered markers highlight the exact places like Reddit, TikTok, or ChatGPT, where your brand needs to be highly visible to save the sale.



AI helps evaluate complex decisions

Throughout the journey, AI helps the customer evaluate different aspects of the treatment process, including costs, insurance coverage, side effects, and treatment options.

Rather than searching for individual facts, the consumer uses AI to understand a complex decision landscape. AI helps organize information, compare alternatives, and identify the factors most likely to influence the final choice.

Community validation remains critical

At the same time, AI is not the only source of influence.

The customer repeatedly consults TikTok, Reddit, and YouTube throughout the journey. These platforms provide something AI cannot easily replicate: real-world experiences from people who have already undergone treatment.

Consumers exploring transformational purchases often seek reassurance from people facing similar challenges. In this journey, user-generated content plays a critical role in validating claims, understanding side effects, and setting expectations.

**Edward's Take**

Edward Sturm
SEO and marketing expert at edwardsturm.com



Not enough brands actively ask customers to give them video reviews, and even fewer brands reshare those video reviews to social media with detailed, searchable language. Start your posts with your brand name, then with the word "review". Next, still in your description, provide the full transcript of the review to make it easy for AI to extract the video's contents.

Trust is built across multiple sources

One of the most important insights from this journey is that trust is distributed across platforms.

AI helps consumers understand options and evaluate trade-offs. Social platforms and online communities provide lived experience and credibility. Search engines and brand websites help validate details and facilitate action.

The customer does not rely on a single source of information. Instead, confidence is built through repeated interactions across multiple channels.

AI and community are increasingly complementary

This journey highlights an emerging pattern across many categories: AI and online communities are not competing sources of influence, but increasingly complementary.

AI helps consumers understand what questions to ask and which options to consider, while communities help them determine whether those options are trustworthy, practical, and relevant to their own situation.

As AI becomes more integrated into customer journeys, the brands that succeed will be those that understand both sides of this equation: the algorithmic evaluation within AI systems and the human validation within communities.

Edward's Take

Edward Sturm
SEO and marketing expert at edwardsturm.com



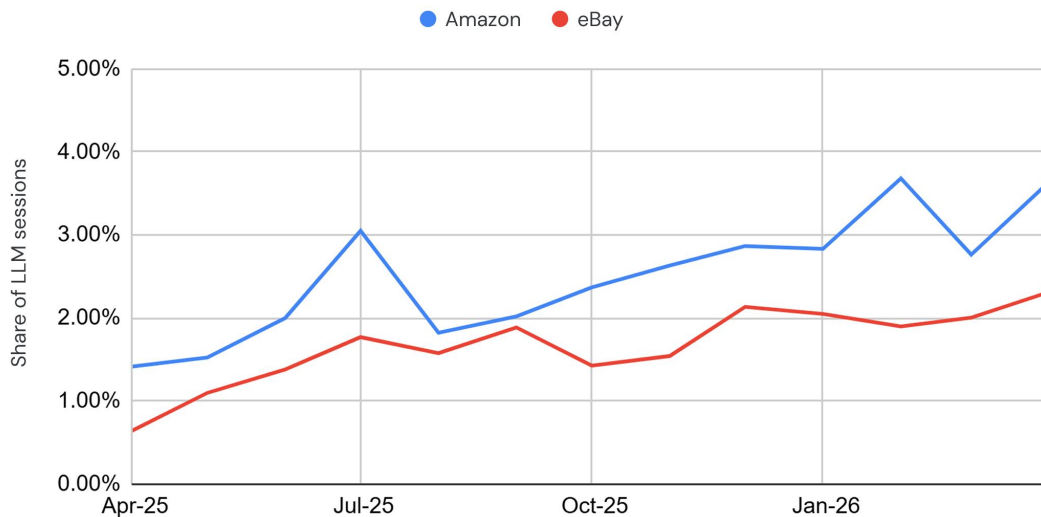
Once your brand is big enough to allocate resources to having both a dedicated Reddit community and branded community accounts to respond to commentary across subreddits, it's worth it. Reddit has become a battleground for disinformation and search/AI visibility. Every major brand needs a Reddit strategy.



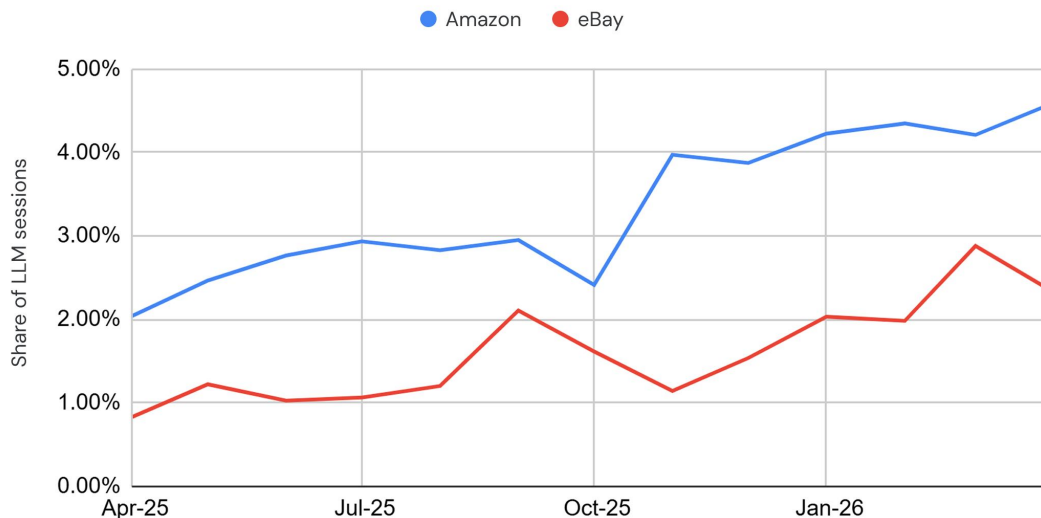
AI participates deeper in the purchase journey

Across both the US and Europe, the share of AI sessions that result in a purchase has grown substantially. On Amazon, that figure has roughly doubled over the past year, reaching approximately 4.6% in Europe and 3.6% in the US.

Share of LLM sessions that led to a purchase, US



Share of LLM sessions that led to a purchase, EU & UK

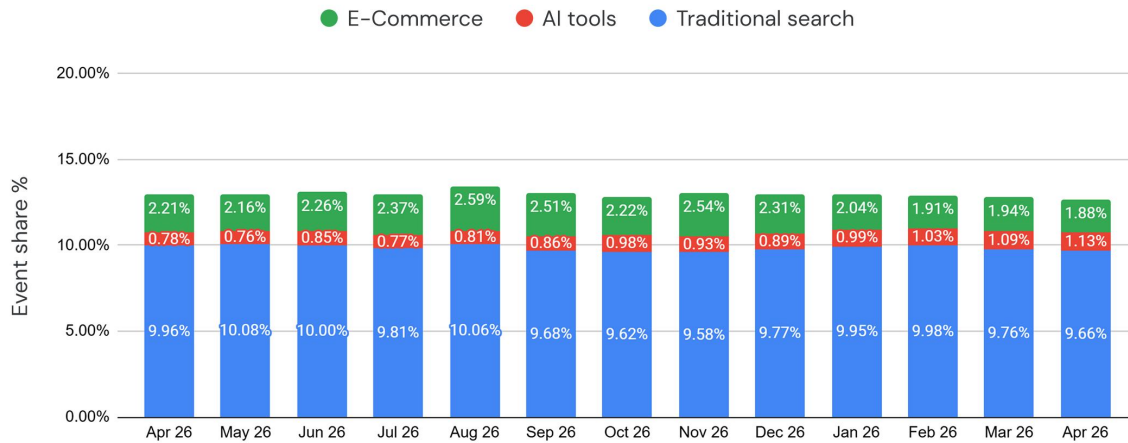


Share of LLM sessions that led to a purchase = Sessions with an LLM-referred e-commerce visit and at least one purchase / Sessions with at least one e-commerce purchase * 100%



At the same time, AI remains a relatively small source of overall traffic. AI-generated visits (to ChatGPT, Perplexity, Claude, Gemini, Copilot, Deepseek) account for roughly one-tenth the volume of traditional search and approximately half the volume of ecommerce platform visits. However, unlike the other channels, AI continues to gain share rapidly, growing by roughly 45–60% over the period analyzed.

Search, AI, and E-Commerce platform visits in the EU & UK



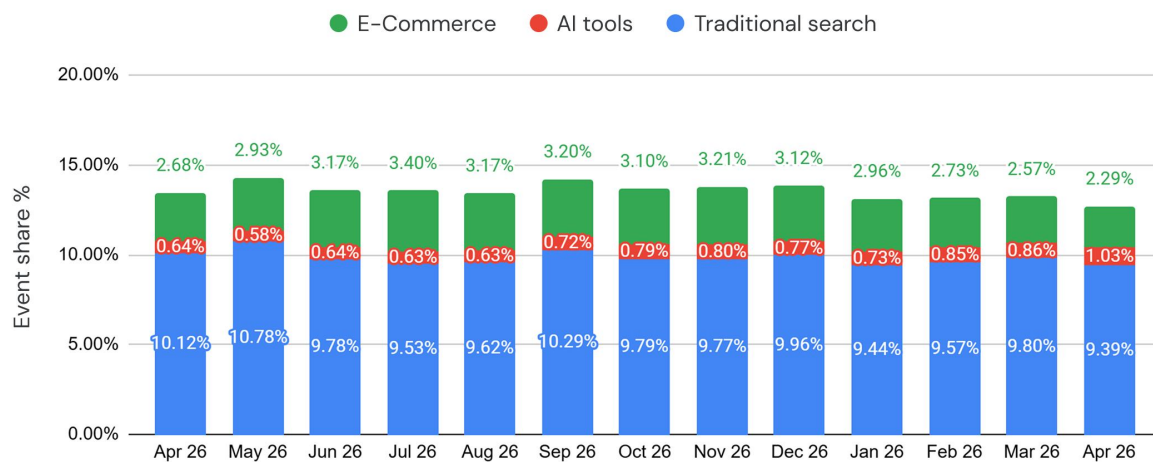
Monthly Events Share (%) = Monthly visits to domain's webpages / Total monthly webpage visits across entire panel * 100%



Source: Datos



Search, AI, and E-Commerce platform visits in the US



Monthly Events Share (%) = Monthly visits to domain's webpages / Total monthly webpage visits across entire panel * 100%



Source: Datos



The Dell gaming PC journey demonstrates how AI can influence decisions near the point of conversion.



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Edward's Take

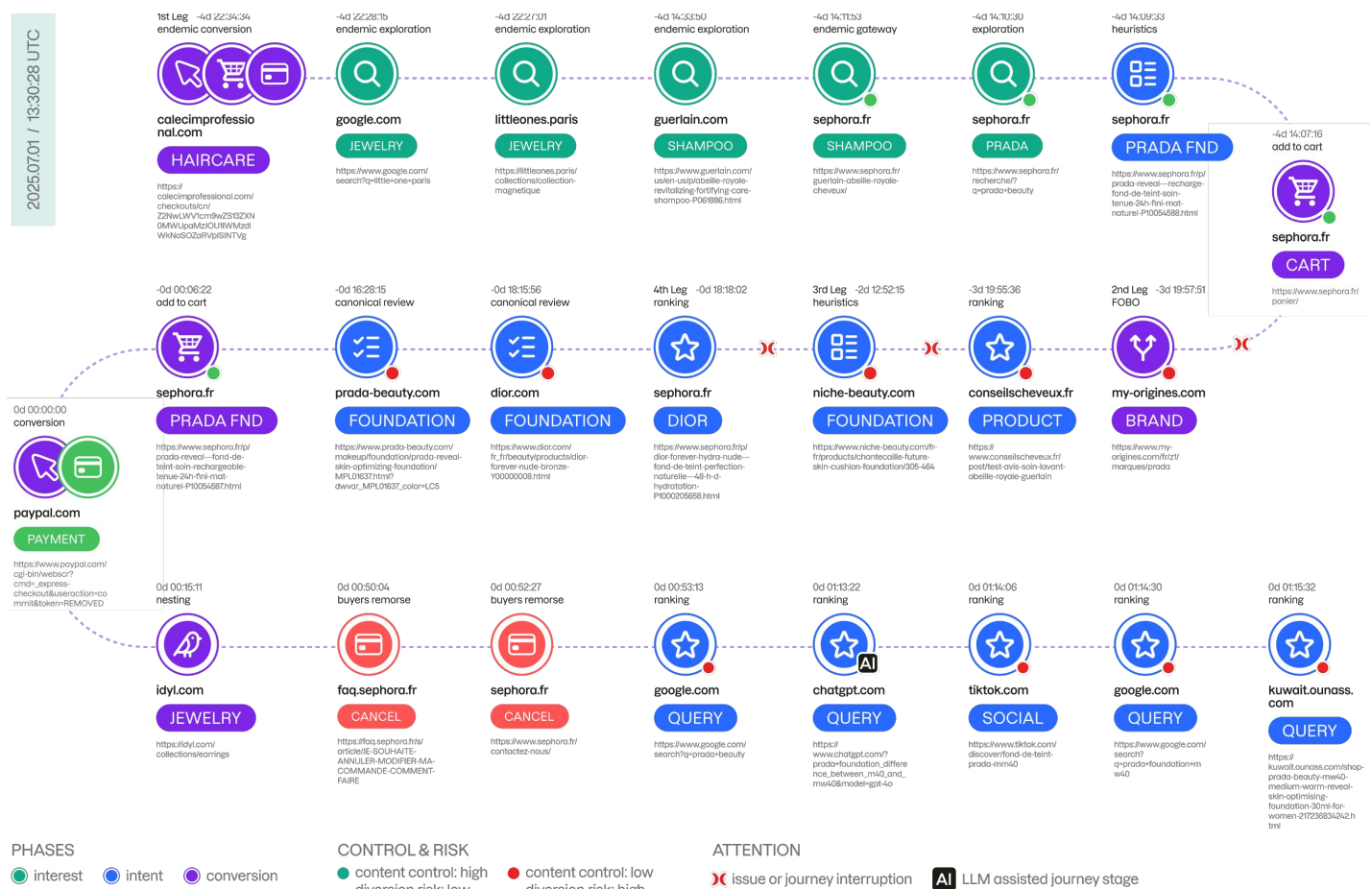
Edward Sturm
SEO and marketing expert at edwardsturm.com



An easy thing any brand can do, especially smaller brands, is have an up-to-date page on their website for "Deals." This ensures people see the deals you want them to see and helps potential customers enter your funnel at the point most likely to lead to conversion.

This Sephora journey demonstrates another emerging behavior: AI participation after the purchase has already occurred.

Sephora journey



*Leg: A major turning point where a buyer changes their mind, switches platforms, or checks out a competitor. These numbered markers highlight the exact places like Reddit, TikTok, or ChatGPT, where your brand needs to be highly visible to save the sale.

The customer purchases a Prada foundation from Sephora, but uncertainty about shade selection leads to additional research after checkout. Rather than relying solely on brand content, the customer consults TikTok, Google, reviews, and ChatGPT to validate the decision.



AI extends beyond conversion

Traditionally, marketers view conversion as the end of the journey; this journey suggests otherwise.

Even after the transaction is complete, the customer continues seeking reassurance that the correct purchase was made. AI becomes part of this validation process, helping reduce uncertainty and reinforce confidence in the decision.

Alongside TikTok, reviews, and search engines, AI serves as another source of post-purchase confirmation.

Philip's Take

Philip Armstrong
Chief Data Officer at Truth in Data & Consultant at Semrush



Journeys are complex jobs to be done. Here we have a self-pampering journey, not a commodity product replacement – she doesn't refill toilet paper, she's looking at jewelry, haircare and makeup foundation. It is very important for digital marketers to understand how their product fits into the overall job to be done.

The purchase journey doesn't end at checkout

Together, the Dell and Sephora journeys illustrate how AI's role is expanding.

In the Dell journey, AI helps optimize the path to purchase. In the Sephora journey, AI helps validate the decision after it occurs.

These examples show that AI is not confined to early-stage research. Increasingly, it participates throughout the customer lifecycle, from evaluation and comparison to transaction and post-purchase reassurance.

Eli's Take

Eli Goodman
President of Datos & VP Product Sales at Semrush



But also remember that AI search isn't able to answer every question, which is why you see these journeys intertwined with the more traditional activities like Google Search and YouTube Video consumption before making decisions.

As AI becomes more embedded in digital behavior, its influence extends beyond helping consumers decide what to buy. It is increasingly shaping how they buy, where they buy, and how they feel about their purchase afterward.



Key Takeaways

- ✓ AI is becoming a natural part of customer journeys rather than a standalone destination.
- ✓ AI is increasingly helping consumers evaluate options, compare alternatives, and make decisions.
- ✓ Communities, social platforms, and search engines remain critical sources of trust and validation.
- ✓ AI participation is extending deeper into purchase journeys, influencing retailer selection, purchase optimization, and post-purchase behavior.
- ✓ AI remains a relatively small traffic source compared to search and ecommerce, but it is growing significantly faster than either channel.
- ✓ The future customer journey will be shaped by the interaction between AI, search, social platforms, communities, ecommerce sites, and brands, not by any single platform alone.

Edward's Take

Edward Sturm
SEO and marketing expert at edwardsturm.com



The brands that win are

1. optimizing for high-intent language while still anticipating questions potential customers will face
2. ensuring positive reviews are distributed across platforms.

This makes sure both searchers and AI have what they need to make your brand a top pick.

Get in touch to find out more applications of clickstream data

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About Datos, A Semrush Company

Datos is a global clickstream data provider focused on licensing anonymized, at scale, privacy-secured datasets to ensure its clients and partners are safe in an otherwise perilous marketplace. Datos offers access to the desktop and mobile browsing behavior for tens of millions of users across the globe, packaged into clean, easy to understand data products. Datos' mission is to provide clickstream data built on trust, and driven by tangible results. Major firms around the globe trust Datos to provide the data they need to stop operating blindly in an ever-changing digital landscape. Datos was founded in 2019 and has offices in New York City (HQ), Spain, and Germany.

Notes on data presentation/methodology

The data displayed in this report has been provided by Datos, A Semrush Company. The analysis is based on Datos' US, EU and UK panels, representing a diverse and statistically significant sample of users, and covers the months of April 2025 – April 2026. For further information please visit Datos's [website](#) and its [Privacy Policy](#).

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