

# Emerging Trends in Consumer AI Adoption in Europe

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Email  
[Alsurvey@verdane.com](mailto:Alsurvey@verdane.com)

LinkedIn  
[linkedin.com/company/verdane](https://www.linkedin.com/company/verdane)

Web  
[verdane.com](https://verdane.com)





Executive summary

42%

of respondents were identified as active users and early adopters, defined as using conversational AI either at work or privately at least monthly.

30%

of active users prefer conversational AI over traditional search engines.

Consumers are adopting conversational AI, especially in their private lives.

Verdane’s study of 7,282 individuals aged 18-60 across Sweden, Norway, Denmark, Finland, Germany and the UK sheds light on how people use conversational AI, such as OpenAI’s ChatGPT, Google Gemini and Microsoft Copilot in their lives both professionally and privately. The study set out to identify differences in adoption between markets as well as private and work settings. 42% of respondents were identified as active users and early adopters, defined as using conversational AI either at work or privately at least monthly. Private use of conversational AI is more common: Average active adoption at work across all markets is 41% and privately 53%. The UK leads daily professional use at 17%, while Denmark has the highest daily private use at 14%. Active users are confident that their use of conversational AI will grow or remain at similar levels in the coming six months: 95% believe so for private use, while 83% think this will be the case at work.

AI is used to search information and research purchases

The active conversational AI users were asked about their usage of AI to find information. 30% of active users prefer conversational AI over traditional search engines. The main drivers for preference for these respondents were the ability to get direct answers (57%), better summarisation of information (55%) and the ease of asking follow-up questions in natural language (54%).

To understand whether AI plays a major role in purchase decisions, active users were asked about how often they use conversational AI tools to help decide what to buy or compare products and services. The answers paint a picture of changing customer behaviour: 76% have used AI for this purpose, with 17% doing so most of the time or every time when considering a purchase.

Companies relying on traditional search engine advertising are at risk of disruption

The findings clearly show that consumers are already changing how they discover and research products. For companies operating in consumer-facing sectors, this shift demands a reassessment of how to engage potential buyers. Instead of relying on buying traffic to fuel growth, future-proofed companies in our view will need to succeed in three things: Embracing the change and adapting tactics to be visible in LLMs where customers increasingly turn to is needed to remain visible in the AI age. Increased investment in upper funnel marketing and brand building will in our opinion be a more sustainable source for growth. Finally, building brands and products that customers love and are passionate about is something AI won’t replace or disrupt. If anything, proof of genuine engagement across the internet might be the reason your brand comes up when customers ask AI for recommendations.

Individuals

7,282

Age group

18-60

Countries



Conversational AI





# Key statistics

42%

of survey respondents are active users of conversational AI, based on our qualification criteria of using conversational AI either at work or privately at least monthly.

NB: When referring to AI use, we refer specifically to the use of conversational AI, such as OpenAI’s ChatGPT, Google Gemini and similar LLMs.

95%

of all active conversational AI users anticipate maintaining or increasing their private usage.

58%

of active AI users expect their use of AI in their private life to grow in the next 6 months.

30%

of active AI users now prefer a conversational AI tool over a search engine for finding information.

Source: Verdane/Norstat survey of 7,282 respondents across Sweden, Norway, Finland, Denmark, the UK and Germany. Fieldwork carried out in June 2025.

- The UK leads daily professional usage of conversational AI with 17% of respondents in the country saying they use conversational AI every day at work, while Denmark has the highest daily private use at 14%. Finland has the lowest active adoption in professional usage (37%) and privately (46%). Average active adoption at work across all markets is 41% and privately 53%.
- Among active users of AI, 76% have used AI to research a product and 17% do so frequently.
- Of these active AI users who have used AI for shopping, 77% have used conversational AI to discover a product or brand, 88% to compare different options, 73% to find the best price and 78% to support a final purchase decision.
- 37% of active users of AI in the UK include AI in their purchase journey either every time or most of the time. 12% of active AI users in the UK use AI every time they consider a purchase.
- 30% of respondents engage with conversational AI daily or several times per week privately, compared to 26% in professional settings.
- 46% of respondents have never used AI at work, while 29% have never done so privately.
- Among active AI users, 58% identify as white-collar workers and 14% as blue-collar, with 13% identifying as students.
- By size, Millennials make up the largest generational segment of active users of AI at 45%, followed by Gen Z at 28% and Gen X at 27% in the individuals aged 18-60 in the study.





# AI Is Eating the Digital Marketing Playbook



By Daniel Ahlstrand,  
Partner at Verdane

For the past decade, a tried-and-tested growth formula for consumer brands was to buy your way to visibility. Pay-per-click campaigns on Google and Facebook could reliably funnel high-intent shoppers to your site. Today, that playbook is quietly unraveling. Large language models (LLMs) from ChatGPT to Google's Gemini are reshaping how consumers find information and products online, bypassing the traditional search-and-ad funnel. This shift has profound implications for how businesses pursue growth and how we, as investors, evaluate companies.

## The old growth formula is breaking

Consumers are increasingly turning to AI assistants for advice that search engines used to provide. Verdane's 2025 survey of 7,282 consumers in the UK, Nordics and Germany reflects this trend: among active AI users in these markets, 76% have used AI when researching purchases at least occasionally and 17% do so frequently. In the UK, a leader in adoption, over a quarter of these shoppers now include AI assistants in their purchase journey most of the time, 12% every time they consider a purchase.

Critically, these AI-savvy consumers aren't using Google's Search as their starting point: they're asking the LLM directly. Our research found that while Google is still the default for many, 30% of active AI users now prefer a conversational AI tool over a search engine for finding information. They cite the appeal of direct answers, better summaries and follow-up Q&A in natural language. Unlike a classic Google query that yields a list of links, an LLM can digest all those links for you and serve up a single, synthesised answer. Often this happens with zero clicks: the AI delivers what you need without you ever visiting a website. Notably, [Gartner](#) predicts that brands could see a 25% drop in traditional search traffic over the next three years as AI assistants siphon users' attention. The biggest barrier for wider adoption for AI in shopping according to our findings? Not having thought about using AI for this purpose, at 45% of non-shopping users, ahead of I don't need help to buy or compare at 31%.

For companies reliant on search engine optimisation and pay-per-click ads, these developments are a wake-up call. If a conversational AI can answer "What's the best running shoe for flat feet?" by directly naming a product, or in the future even take care of the purchase, far fewer users will scroll through sponsored links or hunt for your website. In short, the old tricks are becoming less effective as more of the customer journey moves inside AI interfaces.

## A strategic risk for businesses

Despite these seismic shifts in user behaviour, the advertising establishment has been slow to react. There's a lot of inertia and incentive to cling to the status quo. Tech giants like Google have every reason to reassure marketers that all is well. Legacy media buyers and agencies, whose fees often scale with ad spend, also have little immediate motivation to rock the boat. As long as the quarterly numbers look stable, it's tempting to keep pouring money into the same channels and chalk up any declines in efficiency to temporary noise. At the same time, our survey shows 58% of active AI users expect their use of AI in their private life to grow in the next 6 months. This, paired with a high satisfaction in AI as a companion for shopping along already notable usage, makes it hard to believe that last year's playbook is the one to get best results with in the coming 12 months.



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The practice of focusing exclusively on generic paid search as the primary driver of growth has been diminishing in incremental value within most industries. These changes to customer behavior are accelerating this development. When an AI engine sits between consumers and the web, your Google ad may be present but not seen, or seen but not clicked, because the user got their answer from an AI summary. Early data supports this: [when Google's own AI snapshot appears on a results page, click-through rates on paid ads drop by more than half](#). The challenge to companies who rely on buying traffic from Google is two-fold: zero-click searches make scaling with the channel more difficult and as fewer clicks are available, competition for what is left can intensify, potentially pushing CPCs up and reducing ROAS. This misalignment poses a real strategic risk for businesses still overly dependent on third-party ad platforms. History has not been kind to companies that failed to anticipate platform shifts (think of retailers that ignored e-commerce). Likewise, brands that don't adjust their growth tactics for an AI-mediated world could find themselves invisible just as customer discovery undergoes a once-in-a-generation change.

So where does growth come from when you can't simply buy eyeballs as easily? At Verdane, we believe it comes from doubling down on what we call "Massive Customer Love." This means building brands and services that customers genuinely adore. This results in businesses that inspire loyalty, community and advocacy. In an AI-driven landscape, third-party discovery and validation carry more weight than ever. LLMs, after all, draw on the content of the internet. A brand with raving customer reviews, active user-generated content and engaged followers will surface in AI recommendations naturally, because the collective voice of customers creates a signal that the algorithms can't ignore. Conversely, a brand that relies on slick ad copy and funnel tricks, but lacks genuine fan enthusiasm, may find that AI simply omits them from the conversation.

Our investment thesis is evolving to reflect this reality. Verdane has always emphasised fundamentals. Our 9 Ms framework stresses metrics like retention, engagement and customer satisfaction alongside growth. Now, those metrics are even more critical. We have long favored companies with high repeat revenue and strong communities, and we're seeing that pay off. [One of our Nordic portfolio companies, for instance, generates over 70% of its revenue from returning customers](#). That kind of loyalty is marketing gold in the new paradigm: it means a large base of customers likely to recommend the product (online and off), creating rich content for LLMs to pick up. Word-of-mouth is increasingly reflected in algorithmic outputs. A satisfied customer's five-star review or TikTok unboxing video might be the reason AI recommends your product over a competitor's.

We are particularly focused on sectors where customer love creates a moat. Recommerce platforms (resale and circular economy businesses) thrive on trust and user community: exactly the attributes AI-driven discovery will amplify. "Sticky" digital services with subscription models and high engagement naturally generate the retention and first-party data needed to stay relevant when third-party data (and cookies) wane. And private-label consumer products with differentiated go-to-market models often rely on direct fanbases and niche appeal rather than brute-force ad spending. These areas align with a future where growth comes from being truly top-of-mind and top-of-reputation, not just top-of-search.

None of this is to suggest that performance marketing will disappear overnight. But its golden age of easy arbitrage might be ending. The brands that will win in the coming years are those that treat an LLM not as a new ad channel to be gamed, but as an intelligence reflecting real market sentiment. In practical terms, that means investing in product quality, customer experience, community management and content that genuinely helps and delights users. It means measuring success not just by CAC and conversion rates, but by repeat purchase rates, referral rates and customer lifetime value. These are the metrics Verdane watches closely when evaluating companies and a reason why we will continue to champion businesses that earn massive customer love rather than try to rent customers through endless ad spend.

Digital consumer companies have always needed to chase growth, often at any cost. The difference now is that growth can't be bought as readily: it must be earned. In the age of AI-mediated consumer decisions, the old growth hacks are giving way to a new rule - make your customers love you and the algorithms will follow. Companies and investors that embrace this shift will be the ones writing the next chapter of digital consumer success. Those that don't take action may wake up to find that the game has changed and they never even saw it coming.



# Introduction

Conversational AI is significantly reshaping consumer behaviour, challenging established habits and redefining purchase decision processes. A survey conducted by Verdane of over 7,000 respondents from the Nordics, Germany and the UK provides detailed insights into how these shifts are playing out in Northwestern Europe. In this report we share key findings from this study, along with our analysis of the drivers of this behaviour, as well as its implications for B2C companies.

At Verdane, we invest in structural growth by backing companies set to outperform established competition, often by leveraging new technology. Artificial Intelligence is widely regarded as the most impactful technological advancement of the decade, with Large Language Models (LLMs) already enabling efficiency gains in areas such as copywriting, marketing visuals, scalable customer support solutions and software development.

For growth stage companies such as the ones Verdane invests in, this presents a great opportunity to punch above one's weight class. Tasks that previously required substantial time or budget, like localising ecommerce storefronts into multiple European languages or producing high-quality marketing videos, can now be achieved faster and more cost-effectively. Use cases such as these also provide value that goes beyond cost savings by enhancing customer experience and relevance.

While the efficiency gains and disruptive potential of AI has been extensively discussed, the focus has largely remained on workplace applications. However, we firmly believe that understanding consumer-facing use cases is equally important. For consumer companies, engaging customers effectively across various touchpoints, from initial awareness to comparison and the point of purchase, is key to ultimately winning their business. Google's ad network and search engine have long dominated these touchpoints, making it the main recipient of digital marketing budgets. Our hypothesis this spring was that advancements in conversational AI such as Open AI's ChatGPT, Microsoft Copilot and Google's Gemini, would encourage consumers to use AI alongside traditional search engines.

While data from across the Atlantic pointed in this direction, no such research had been conducted on the topic in Verdane's home markets. To understand whether this shift in consumer behaviour was already observable, we commissioned a survey with leading provider Norstat across 7,282 individuals aged 18 to 60 in Sweden, Denmark, Finland, Norway, Germany and the UK. From this pool of people, we identified approximately 500 people per market who are active users of conversational AI, either at work or in their personal lives. These active users and early adopters form the core focus of this study. What they're already doing offers a glimpse of where mainstream consumer behaviour may be headed next.

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This presents a great opportunity to punch above one's weight class



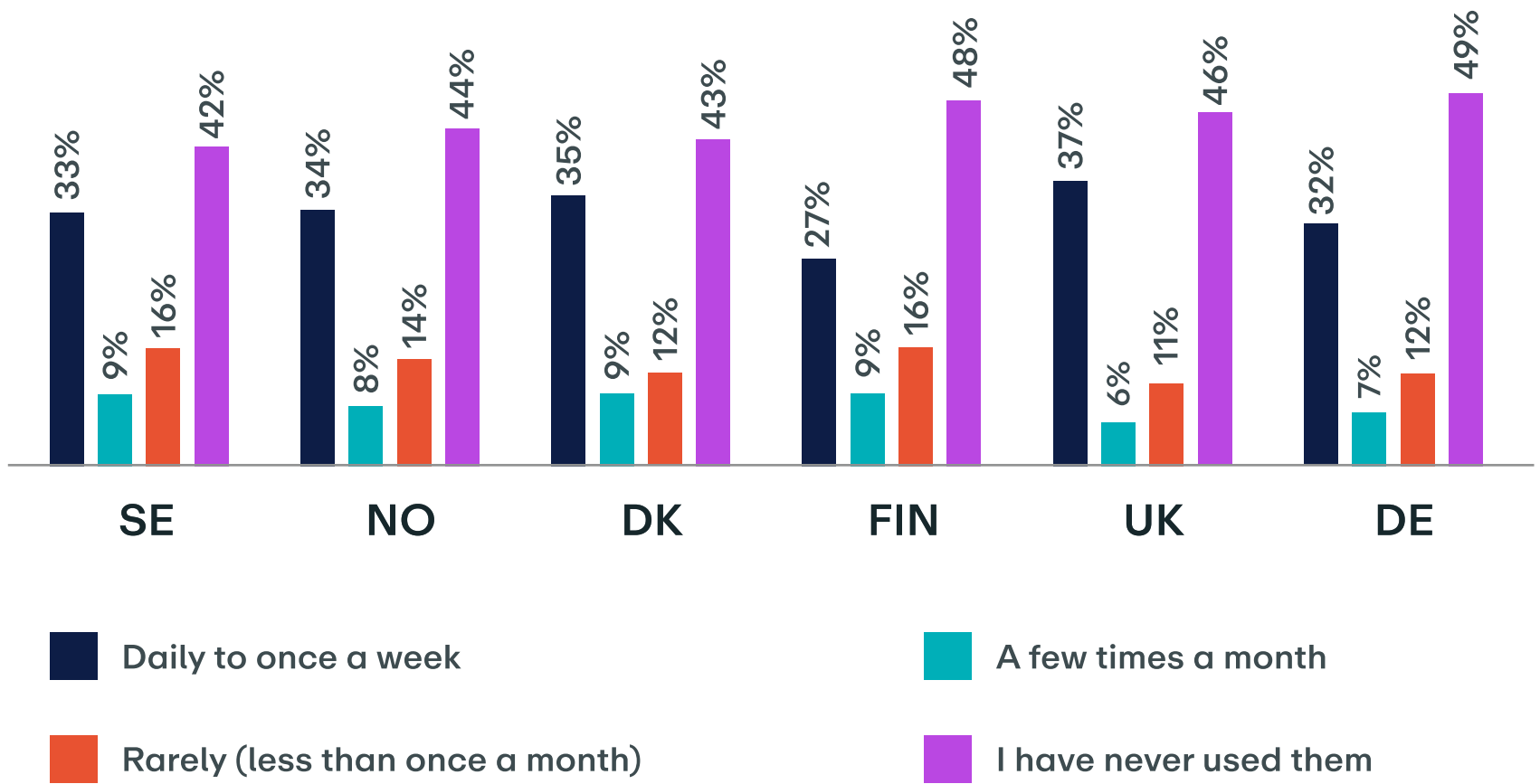


# Detailed insights on where consumers use AI across markets

Looking at population ages 18-60 across these six markets, private use of conversational AI currently exceeds professional use, suggesting a broader and more universal appeal. About 30% of respondents engage with conversational AI daily or several times per week privately, compared to 26% in professional settings. The survey highlights substantial untapped potential: 46% have never used AI at work, while 29% have never done so privately. The UK leads daily professional usage at 17%, while Denmark has the highest daily private use at 14%. Finland has the lowest active adoption across both work and private use.

n=7,282, all respondents aged 18-60

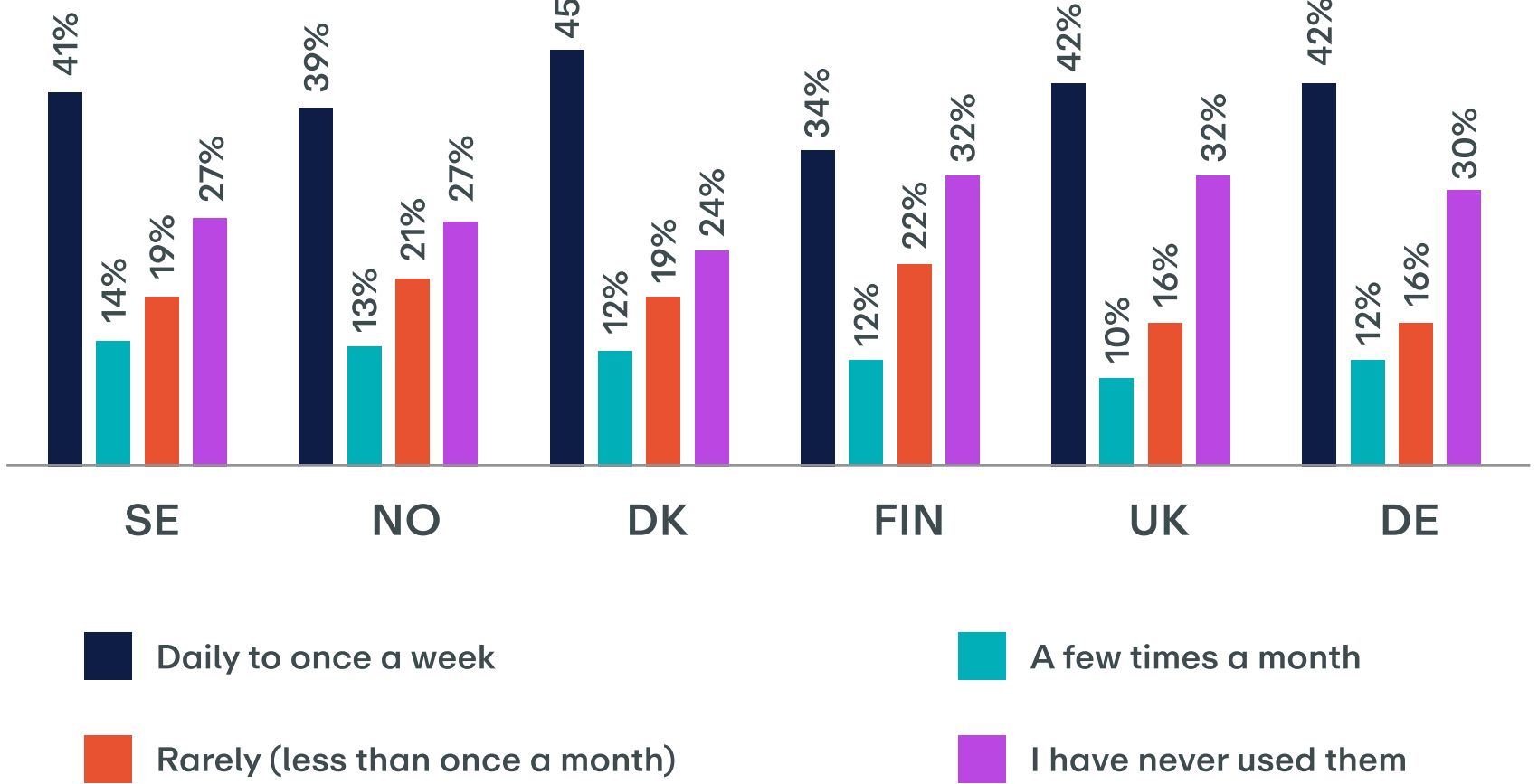
How often do you use AI at work, by country



While daily use rates are similar between work and private life on average, private use shows a wider range of frequency. This may be because personal applications of AI are more universal and typically less dependent on job type. We also believe them to be easier to discover independently. Among active AI users, 58% identify as white-collar workers and 14% as blue-collar. Younger generations are particularly active, with women ages 18-30 standing out as prominent early adopters.

The reasons behind national differences in adoption are not immediately clear. While leading large language models perform well across languages, it’s possible that the absence of real or perceived language barriers has given the UK a head start in adoption. English-language dominance in AI interfaces may create a more approachable entry point compared to smaller language markets like Finland.

How often do you use AI privately, by country



To better understand barriers to adoption, we asked infrequent users (those using AI less than once a month) about their main reasons for not using it more frequently. The most common response was not seeing a use for AI in their daily lives (46%), followed by a preference to do things themselves (34%) and a lack of trust in AI tools or their output (21%). While a preference for manual methods may remain stable, we expect that perceived usefulness will increase as tools evolve.

Several improvements to AI tools are already expanding their appeal. For example, in 2024, most conversational AI tools lacked real-time internet access. That limitation has since been addressed, unlocking more relevant and timely answers. Likewise, newer model versions are expected to become more reliable and less prone to hallucinations. These developments directly address some of the most common concerns among current non-users.

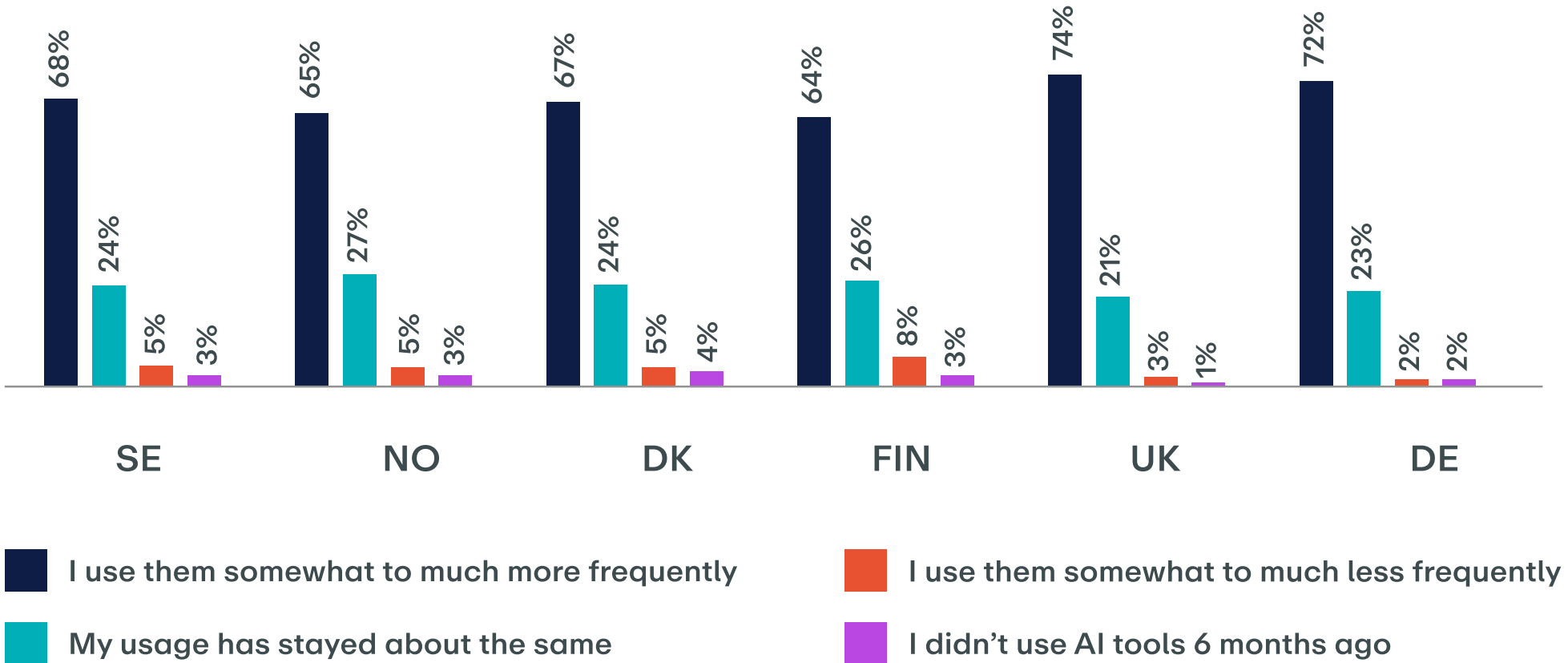


Despite these advancements, most non-adopters do not anticipate a significant change in their own usage. Only 21% of non-adopters expect to use AI more at work, and 22% privately. The top factors that could change this include having a clearer need for AI in their personal lives (41%), in their work (30%), or greater trust in the tools (25%). Rather than seeing AI adoption as something that happens first at the workplace, these findings support the notion of private use leading the way for the non-adopter group in the future. If the companies behind the most popular conversational AI models are able to build trust through better accuracy and transparency, and if everyday use cases continue to spread via friends, family, and social media, even the more hesitant users may eventually be won over.

In the coming 12 months we expect adoption to keep growing, driven especially by a greater clarity in the value AI can bring as use of AI becomes more commonplace and people share and discover the most useful use cases both at work and in their private lives.

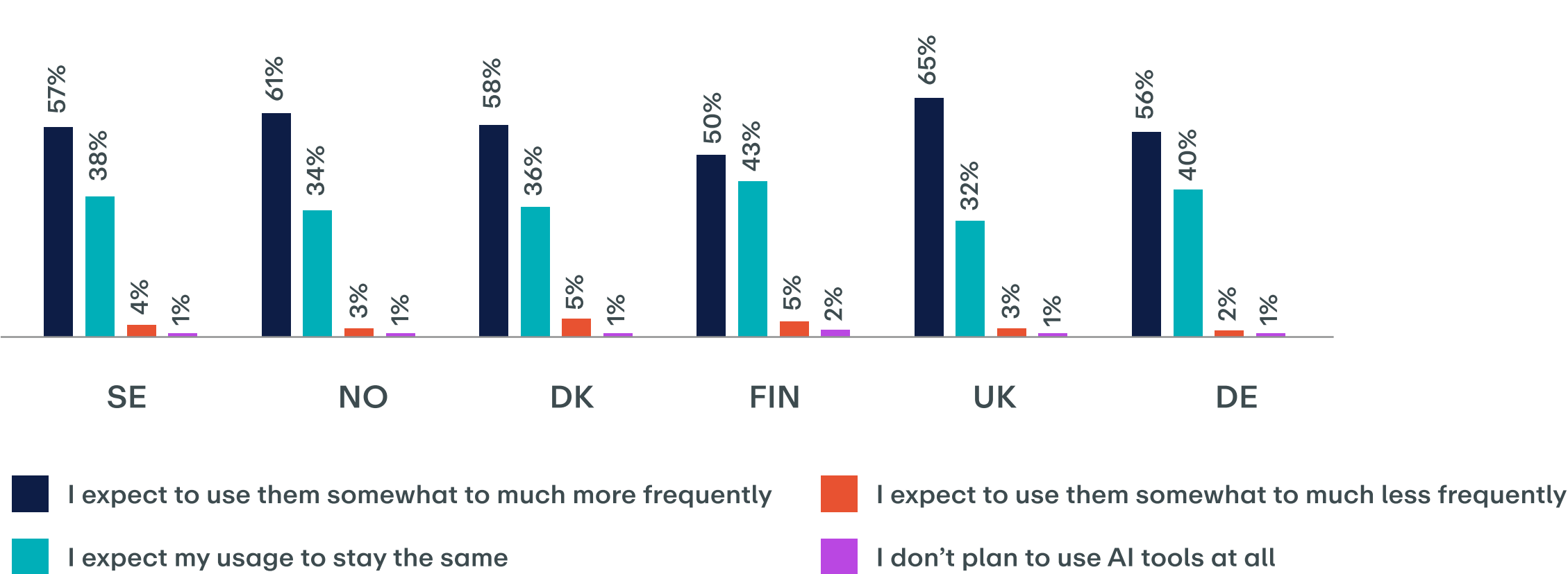
When turning our focus to the group of respondents who are active users either at work or privately, 68% have increased their AI usage at work compared to six months prior, and 69% have increased their private usage. Looking ahead, 56% believe their professional AI usage will continue to rise. Most strikingly, 95% all active AI users anticipate maintaining or increasing their private usage. This tells us two things. First, early adopters are seeing tangible value in their private use of AI, which fuels continued exploration. 71% say AI has had a positive impact on their lives. Second, we can hypothesise that people are more willing to experiment with new private use cases and may already be proactively discovering new use cases for their personal lives. Private use cases benefit the individual directly, whereas in contrast in workplace settings experimentation often benefits the organisation more than the individual, and may be restricted by internal policies and guardrails. This dynamic helps explain why private usage may continue to outpace workplace adoption among early users.

Compared to 6 months ago, how has your use of Conversational AI tools (e.g., ChatGPT, Copilot, Gemini, Perplexity or similar) changed? Privately



n=3,008, active conversational AI users

How do you think your use of Conversational AI tools (e.g., ChatGPT, Copilot, Gemini, Perplexity) will change over the next 6 months? Privately



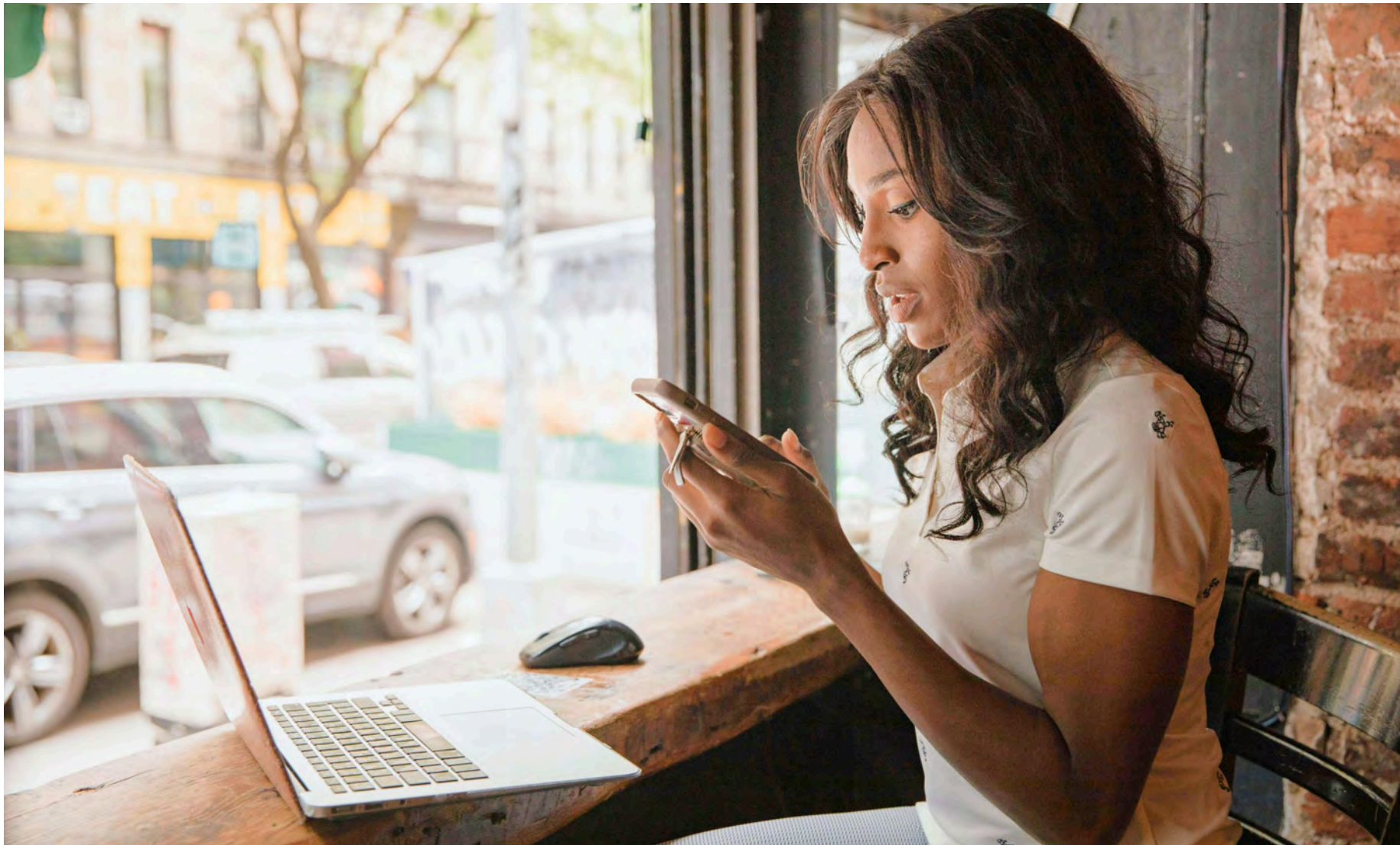
n=3,062, active conversational AI users



# Who is leading the charge in AI adoption?

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**Daily private users of conversational AI are the most active online shoppers, with 31% making 5 or more purchases online per month.**

The survey identifies clear demographic trends among active AI adopters, defined as individuals who use conversational AI tools either privately or professionally more than once a month. Younger women stand out as the most active group, with people aged 18 to 30 notably overrepresented compared to the general population. Within this age group, women are particularly prominent users. At the other end of the spectrum, individuals aged 51 to 60 are significantly less likely to be active users. In terms of generation labels, we define Gen Z as respondents aged 18-28, Millennials as those aged 29-44 and Gen X as those aged 45-60. Due to only individuals aged 18 and up being eligible to answer, some younger Gen Z are not included in this survey. When looking at the active users of conversational AI, their age distribution is as follows: by size, Millennials make up the largest generational segment at 45%, followed by Gen Z at 28% and Gen X at 27%.



**Younger women stand out as the most active group, with people aged 18 to 30 notably overrepresented compared to the general population.**

Given the higher likelihood of white-collar workers encountering AI in their roles, they represent the professional group most inclined to become consistent AI users. Professionally, white-collar workers dominate this active user group (58%), while blue-collar workers represent 14% and students 13%.

Network effects also appear to play an important part in driving adoption. When active users were asked where they get ideas for new use cases, the top answers were colleagues and work contacts (29%) and friends or family (28%). This suggests that being surrounded by other AI users, especially in a work context, is a powerful driver of engagement. For this reason, company leaders should encourage peer-to-peer sharing of use cases and support early adopters, rather than relying only on top-down mandates. Interestingly, the third most cited source of inspiration was asking AI itself (25%), a small but telling sign of how embedded these tools are becoming for this group.

These early adopters are not just quick to integrate AI into their work and personal routines. They are also highly active online shoppers. 46% report making two to four online purchases monthly and 25% make five or more. Daily private users of conversational AI are the most active online shoppers, with 31% making 5 or more purchases online per month. This overlap has real implications for direct-to-consumer brands with an online presence and online retailers and other ecommerce businesses. It suggests that some of their most valuable customer segments may be the first to shift shopping behaviour in response to AI. To stay relevant, direct-to-consumer brands and ecommerce companies will need to adapt their customer acquisition strategies. AI should no longer be viewed only as a tool for internal efficiency. It must also be recognised as a step in the customer journey. These tools are beginning to influence how customers find, evaluate and decide to buy. Businesses that respond to this change early are more likely to maintain relevance with emerging high-value audiences.

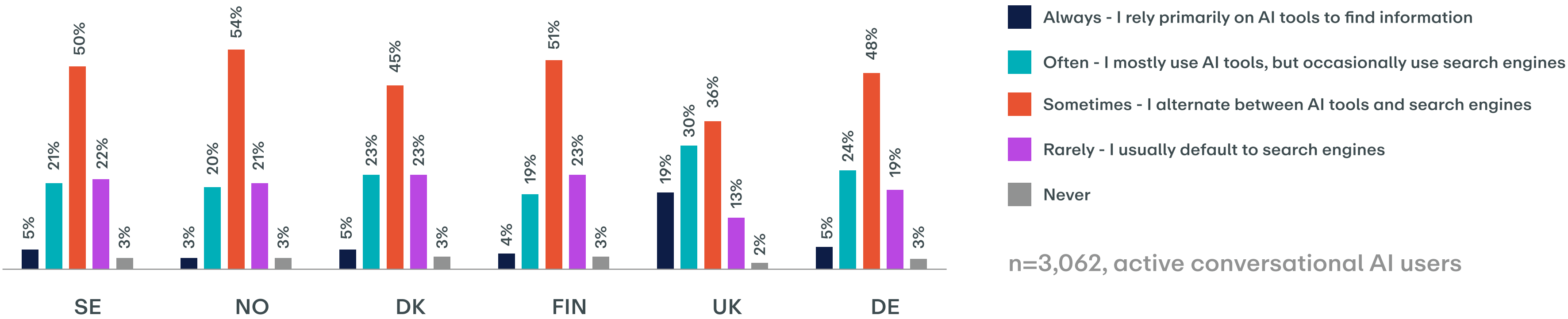


# Dominant AI tools and changing patterns of seeking information

OpenAI’s ChatGPT remains the most widely used AI solution across all markets, with Google's Gemini and Microsoft's Copilot following. Google's Gemini is expected to see increased adoption due to its integration into Google's European search experience, following rollout in the US earlier in 2024. While this may help retain some users, the reality that companies now face is that consumers interact with a different set of platforms when finding information than they did just a few years ago.

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Conversational AI tools maintain context across interactions, similar to how a knowledgeable local might give advice.

How often do you use Conversational AI tools instead of a traditional search engine (e.g., Google, Bing) to find information?



Traditional search engines like Google still dominate, with 70% of active AI users preferring them most of the time or alternating between AI and traditional search. However, 30% now regularly turn to conversational AI tools instead. The top reasons for this shift are the ability to get direct answers (57%), better summarisation of information (55%) and the ease of asking follow-up questions in natural language (54%).

The traditional search experience relies on users entering short queries, such as “Asian restaurants near me,” and receiving a list of links. From there, the user must click through multiple websites to compare options, read reviews and check menus. Google ranks these results using contextual data like location, a site's relevance (which companies aim to influence through SEO) and paid advertisements placed through an auction system. Because most users only click a few links, securing a top spot has become critical for customer acquisition.

Conversational AI changes this experience in several important ways. Rather than relying on a few keywords, users can ask more detailed questions and include specific context. For example, a user might request a restaurant recommendation that accounts for one diner being vegan, the other preferring seafood and whether the dinner is a business meeting or a romantic evening. The AI can interpret these preferences and respond with tailored suggestions, all within the same interface.

Unlike traditional search engines, conversational AI tools maintain context across interactions, similar to how a knowledgeable local might give advice. The user does not need to rephrase or repeat information and the conversation builds naturally. This creates a more seamless and intuitive experience. With this more adaptive approach to discovery, it becomes easier to understand why many early adopters prefer AI tools for certain types of search.

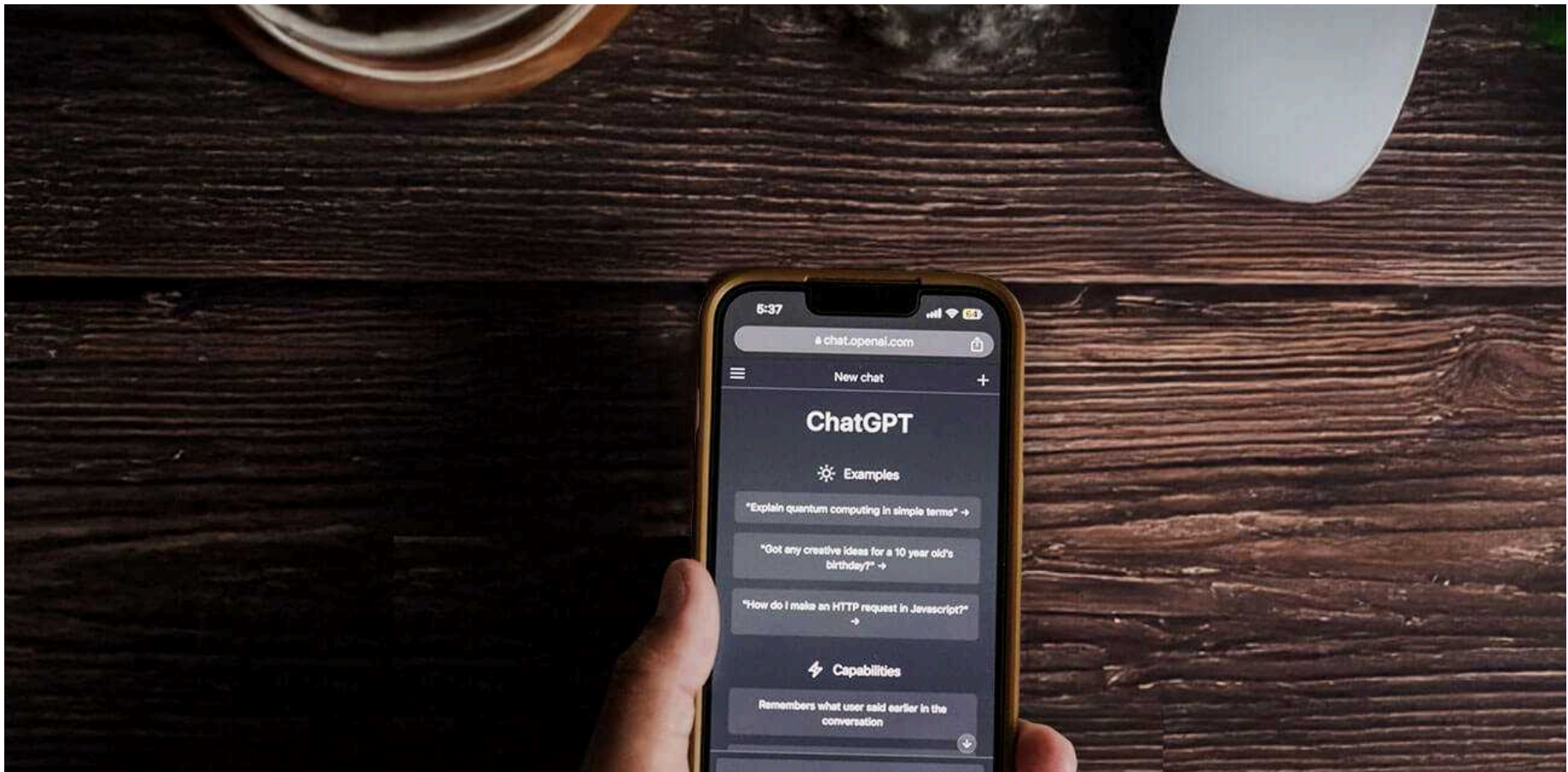


Working with Google on traditional search engine advertising has been a logical choice as the go-to tactic for customer acquisition for many businesses. Google’s search engine has been the place customers go to when looking to find information and research purchases, making it a key channel to master for businesses. With a combination of tactics around organic and paid visibility in the search engine, companies have been able to find growth by investing marketing budget and execution capability in a channel where their customers are. On top of that they have good visibility of how customers interact with their brands, products and advertisements thanks to a high level of transparency on Google’s part, making it easy to measure return on investment as well.

For companies that rely heavily on search engine advertising for customer acquisition this shift presents a multi-layered challenge. First, being savvy at executing on paid advertising on these platforms becomes less of a source of competitive advantage. At the time of writing in July 2025, none of the leading conversational AI solutions in Europe offer advertising options. As more consumers move away from starting every search in a traditional search engine, scaling with paid adverts on the leading search engines becomes more challenging. Continuing to allocate budget into channels with shrinking user engagement can erode return on investment as advertisers compete for fewer clicks, pushing up costs without a corresponding increase in performance. Furthermore, tracking and measurement are more difficult in AI interfaces, as platforms like OpenAI do not share detailed data on search queries, content interactions, or referral paths. This makes the traditional data-driven marketing playbook harder to execute, introducing more uncertainty than most teams have faced in the past decade.

The rise of AI-driven search also creates a visibility challenge for brands. In traditional search, whether through organic results or paid advertising, consumers usually visit a website to find information. With AI-based interfaces, many users get the answers they need directly within the tool, without clicking through to another site. This is known as zero-click search. As a result, companies may experience lower traffic even if their products are being surfaced. This does not mean customers are not engaging with the brand, but it becomes more difficult to track. At least in some industries, visitors who do arrive from AI platforms tend to have high intent and are more likely to convert, but the path is harder to measure. Ensuring visibility within these platforms and improving how your brand appears in AI-generated answers is becoming increasingly important.

Among the 70% of active users who still rely on traditional search engines, the top reasons are familiarity (49% say they are simply used to search engines), a preference for seeing multiple sources (45%) and concerns about AI accuracy (43%). For the first time in decades, Google’s dominance faces credible pressure from new user behaviours and emerging platforms. The reasons for sticking with traditional search engines are more habit-driven than functional. With continuous improvements in AI, these habits could change rapidly, especially among younger and more tech-savvy audiences. For companies, this means a sudden need to master visibility on new platforms that operate with a logic that is materially different from Google’s search engine, while having far more limited visibility when it comes to how customers encounter brands and products.



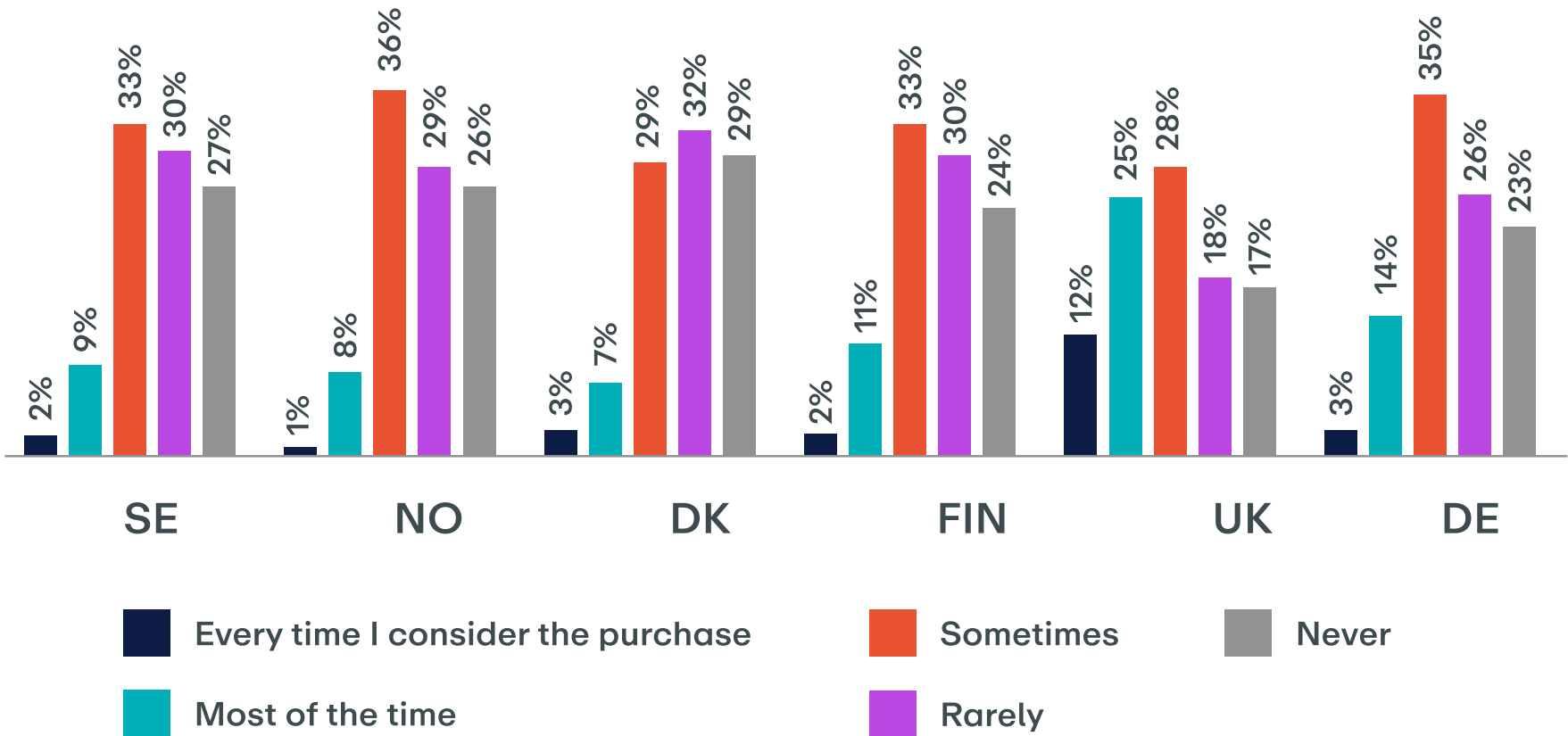
**With AI-based interfaces, many users get the answers they need directly within the tool, without clicking through to another site.**



# Influence of AI on purchase decisions

AI is already influencing how consumers make shopping decisions. Among active users, 76% have used AI when researching purchases at least occasionally and 17% do so most or every time. The UK leads adoption here, with 37% of active users including AI in their purchase journey either every time or most of the time. Interestingly, active AI users in Finland, where adoption is on a lower level compared to other Nordics, are more likely to use AI in their purchase decisions compared to their Nordic peers.

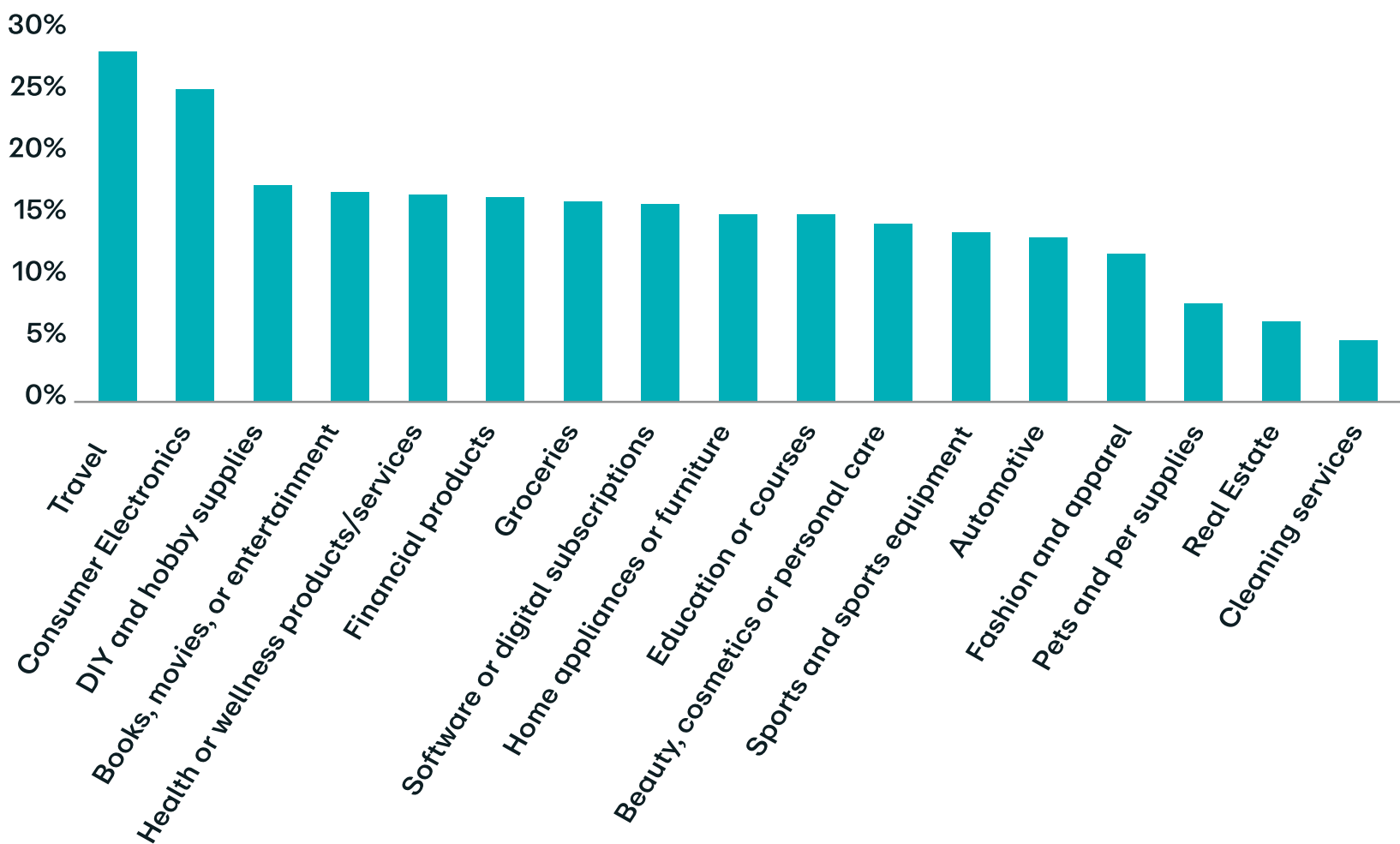
How often do you use Conversational AI tools to help you decide what to buy or compare products or services?



n=3,062, active conversational AI users

AI is used across all stages of the purchase journey. Among active users who have used AI for shopping purposes, 77% have used conversational AI to discover a product or brand, 88% to compare different options, 73% to find the best price and 78% to support a final purchase decision. Those who use AI in these ways are generally satisfied with the results. Across all markets, only a small minority rated their experience as poor or very poor. Satisfaction was highest when comparing different options, with 69% reporting that AI met their needs well or very well. Price comparison showed more mixed results, though 52% were satisfied and only 9% dissatisfied. The high level of satisfaction reported by users who have used AI across the various stages of the purchase journey also lends credence to the view that AI will become a more important part of making purchases in the future.

For which types of products or services have you used Conversational AI tools (e.g., ChatGPT, Copilot, Gemini, Perplexity) to help you decide what to buy or compare options?



How often early adopters use AI in their purchase process varies between categories. Travel, consumer electronics and DIY and hobby supplies are the most commonly mentioned categories among active AI users. These are all areas where researching and comparing products online is already common practice, which may explain the high adoption of AI. In these cases, AI is simply becoming the new tool for a behaviour that already exists. AI adoption in travel and consumer electronics, in particular categories where use of third-party comparison platforms is commonplace, could significantly challenge those platforms' market positions.



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When contrasting AI usage activity to purchase activity, high-value categories such as real estate and automotive show disproportionately high AI engagement relative to purchase frequency. For example 13% have researched with AI in the category automotive, but only 10% have made a purchase in the category in the past year. These are complex, infrequent purchases that involve extensive research, where AI helps clarify information, compare options and serve as a sounding board during decision-making. At the other end of the spectrum, categories like fashion and apparel, beauty and cosmetics and groceries see lower levels of AI involvement. In these cases, consumers often want to see, feel, or try the product before buying and some feel that AI does not yet capture personal preferences like style or taste in a meaningful way.

These differences in behaviour suggest that companies should adapt their approach depending on the category in which they operate. We expect AI to play a larger role in purchases that are expensive, infrequent, or difficult to evaluate. In these cases, companies should focus on creating clear and informative content that supports research and early-stage decision-making. In categories with existing research habits, like travel and consumer electronics, AI usage will be prominent also going forward as consumers shift from traditional comparison tools to conversational interfaces.

Finally, for categories where the product is judged by feel, fit or sensory attributes, such as groceries or fashion, AI usage may not reach high levels. For categories like fashion and apparel, where a notable contingent of shoppers want to physically touch or see products, providing information about materials and sizing in a format that is digestible also for LLMs and not just human eyes will be critical. In practice, this could include clearly written product descriptions, structured specifications and FAQs that AI can reference directly.

Overall, the role of AI in purchase decisions is still evolving but is already an important consideration in several product categories. As consumers become more familiar with what AI can do, and as the tools themselves improve, we expect further growth across more segments. The opportunity for businesses is to be early in understanding what customers are already doing today and to build visibility and relevance inside the interfaces that are now shaping these decisions, regardless of category. The high usage across the various stages of a purchase journey and high satisfaction among users who use AI for this purpose tell us this change may be happening faster than anticipated.



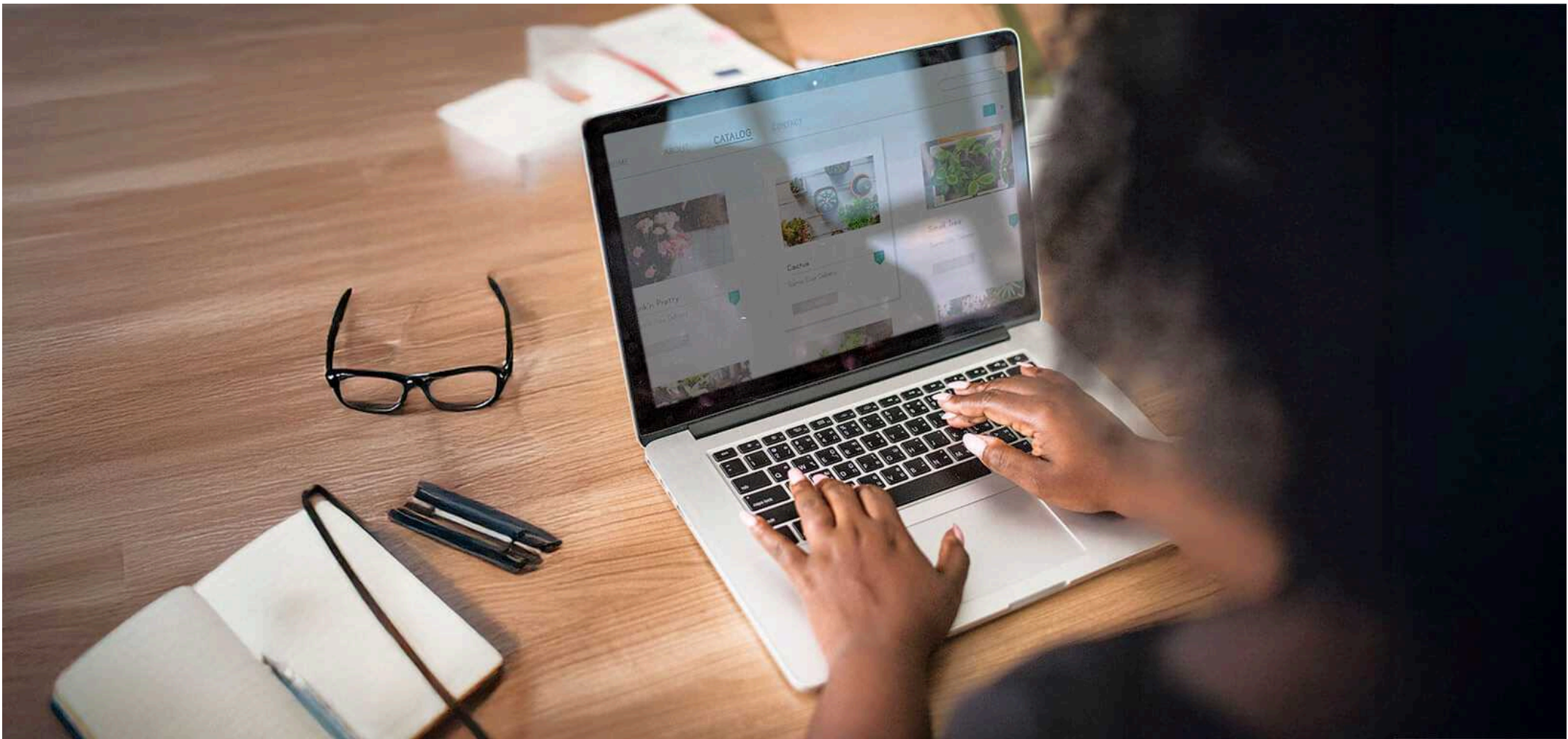


# Barriers and opportunities for expanded use

While AI is being adopted by consumers as an integral part of how purchases are researched, there are also barriers that stand in the way of universal adoption. While general barriers to AI use were covered earlier, looking specifically at what active AI users say would drive increased use in shopping helps identify where adoption may be slower. For consumers who are otherwise active in their use of AI but not yet using AI for shopping decisions, 45% simply haven't considered it as an option. Among current AI shopping users, the primary barriers to further use of AI in shopping decisions include the desire to physically interact with products (37%), the belief AI misses critical personal preferences (33%) and the perception that AI isn't useful for certain purchases (29%) These physical and preference-related limitations will in our expectation remain relevant in certain categories, and therefore we don't expect AI to be universally adopted for every purchase. Still, the fact that many users simply haven't considered AI for shopping suggests there is considerable room for growth as awareness improves.

What we have not discussed or touched upon in this study is the potential future rise of AI purchasing agents. So far, the focus has been on how consumers use AI as a research and comparison tool to support their own purchase decisions. In this model, the user remains in control, with AI helping to narrow down options, clarify information and offer guidance. Even among active users who trust AI input, it is still a person clicking "confirm purchase."

However, a potential shift is on the horizon: the rise of fully autonomous AI purchasing agents. While still more in the realm of science fiction than reality in the summer of 2025, these agents could eventually handle all stages of the purchase journey on behalf of the user. They might detect intent based on user behaviour or contextual cues, curate personalised options, assess eligibility (e.g. budget, availability, preferences) and ultimately complete the transaction without direct human input.



If such systems become mainstream, it would represent a fundamental change in how marketing and sales work. The “customer” in some interactions would no longer be a person, but a machine acting on their behalf. Brands would need to understand how these agents operate, what criteria they prioritise and how to ensure their products or services are discoverable and favored within that logic. AI would effectively become a customer segment in its own right, requiring different tactics to influence than traditional consumers.

While not something we expect to become mainstream in the short term, it is a space forward-looking commercial leaders should track closely. A shift of this kind would reshape acquisition strategies, product discovery flows and the mechanics of conversion itself.

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## Navigating the AI-driven consumer landscape

The findings clearly show that consumers are already changing how they discover and research products. For companies operating in consumer-facing sectors, this shift demands a reassessment of how to engage potential buyers. While some individuals will remain hesitant, among the growing group of adopters, using conversational AI during the purchase journey is already a widespread behaviour. As adoption spreads through personal networks, this trend is likely to accelerate.

For companies that have historically relied on Google Search as their primary channel for customer acquisition, the shift in behaviour creates pressure to rethink their playbook. Best practices for visibility in AI interfaces are still evolving, but two things are already clear: continuing with the status quo will not be enough and companies that begin testing and learning early will gain an advantage.

Buying traffic to fuel growth has already been a game of diminishing returns in many industries, and the shift to conversational AI in searches is in our view a catalyst to a development that has already been happening. For businesses that focus primarily on traffic acquisition via search ads, this is the moment to really re-evaluate the longevity of that approach, especially if it is the only pillar your customer acquisition engine is built on.

When buying traffic and executing on traffic acquisition are no longer sustainably scalable sources of growth or something to differentiate with, the importance of core business fundamentals is underlined. The question “why do our customers choose us?” is a question any CEO should be able to answer point blank. Now there is an urgency to be honest about the answer. If there is no real moat to be built around the answer to that question, the business is at a credible risk of disruption.

With changing customer behaviour accelerating the process of the search engine marketing playbook losing steam, we urge businesses to do three things to future-proof their growth.

### 1 Embrace the change and begin experimenting to ensure visibility in AI searches.

Unlike traditional search engine visibility where the understanding of what drives visibility is well established, visibility in conversational AI is still uncharted territory. As zero-click searches become more common, referral traffic alone no longer tells the full story of how consumers are discovering your brand. Similarly, which specific keyword was used in the search is a relevant datapoint no longer available. While analytics tools for AI search are still limited, running visibility audits by asking AI systems like ChatGPT relevant questions about your category becomes best practice. Testing with self-reported attribution is another method to help build an understanding of where customers encounter your brand. optimizing content for visibility builds upon traditional SEO practices, with more emphasis on intent rather than individual keywords. The new landscape rewards a deeper understanding of customer intent and high-quality content that meets it. The importance of 3rd party sources, such as Wikipedia and Reddit, seem to drive Brand mentions in LLMs in a meaningful way based on some of our early learnings. Technically, companies need to understand what LLMs can and cannot parse from their websites. Structured data and clear product information can improve the odds of being surfaced in AI-driven discovery and are areas that our forerunner consumer companies are actively exploring.

If OpenAI's plans to build and monetise checkout functionality in ChatGPT come to fruition in the near term, ecommerce companies that are already working with AI visibility will be best positioned. Consumer behavior changing further, from researching purchases to completing them with AI, is in our view a feasible future scenario. Considering the level of satisfaction early adopters have with AI as a shopping companion, this may well become reality sooner than many would have expected.



## 2 Invest in building your brand

Most companies chronically underinvest in upper funnel marketing and their brand. The widely cited 60-40 rule (Binet & Field) suggests roughly 60% of a marketing budget should go towards long term brand building, and 40% towards sales activation to maximize effectiveness of marketing and sustainable growth. While not an iron rule, and something to be adjusted by category and competitive situation, most companies fall markedly short of the long term brand building allocation. In a world where AI is eating the advantage that companies excelling in executing sales activation campaigns through e.g. search engine advertising, we perceive brand building investment to be a more future-proof way towards sustainable growth. The efficiency gains of AI are also a boon for companies looking to double-down on upper funnel marketing: with new technology making content creation more accessible and cost efficient, the real differentiator becomes genuine human creativity.

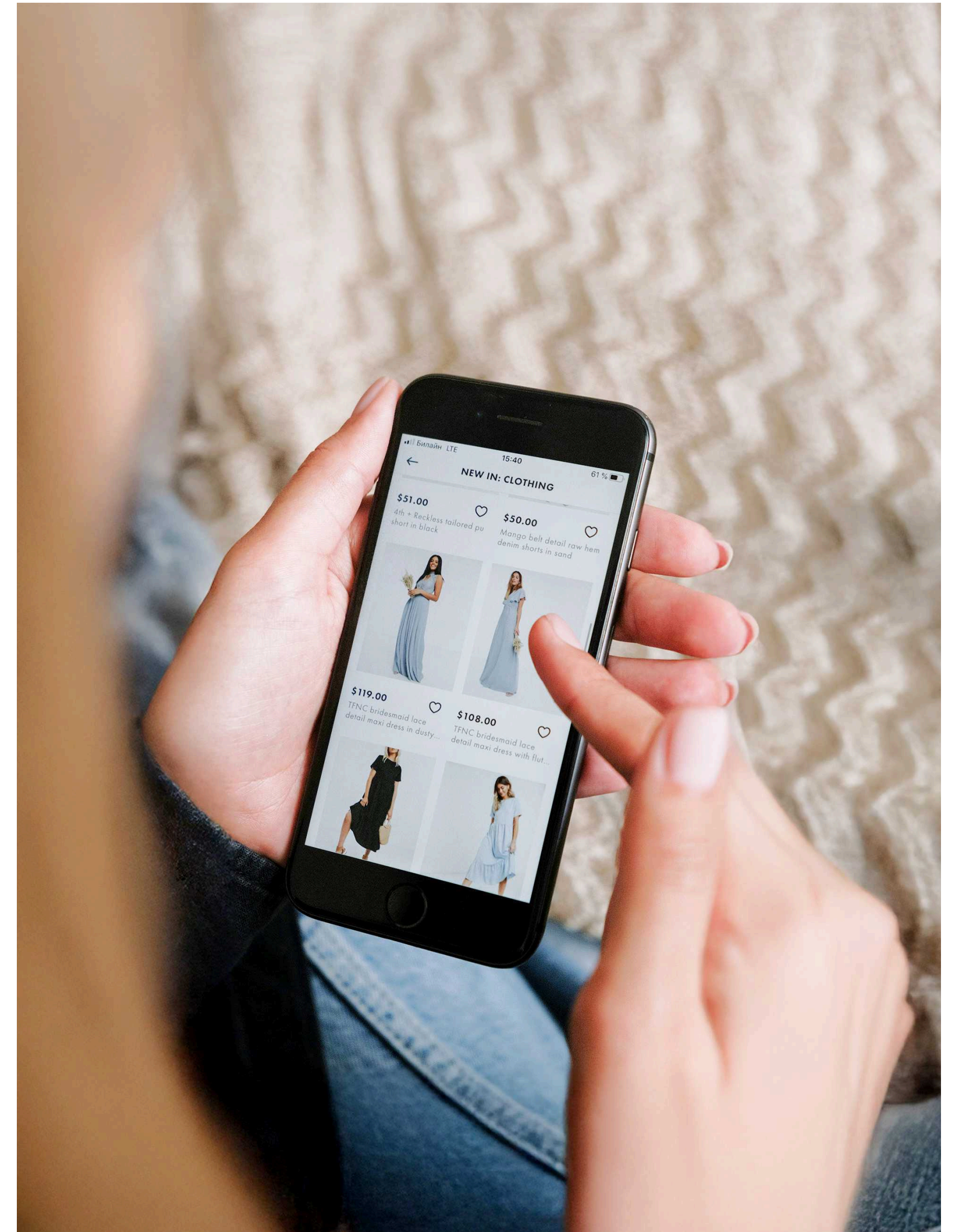
## 3 Build and offer something customers love

Genuine passion for your products and brand are the greatest customer retention drivers. Where ever possible, encourage community building and customer engagement around your products. Consumers already place emphasis on what their peers, friends and family say of products and brands when making purchase decisions. In a future where the internet could overflow with AI generated content, genuine human content, such as discussions on forums and transparent product reviews, will be gold.

While this transition to AI supported purchase journeys presents challenges, it also offers a unique opportunity. Growth-stage companies in particular have a chance to outmaneuver larger competitors by being faster to adapt. The advantage will go to those who embrace change, experiment early and develop strategies based on evidence rather than legacy assumptions.

The findings of this study also highlight something less widely acknowledged: AI is often adopted in private life before it becomes a workplace tool. Both active users and non-users expect their personal use of AI to grow more than their professional use. For early adopters, AI is already a key part of how they explore options and make decisions as consumers. That makes adapting to changing customer behaviour just as important as unlocking internal efficiency gains. Companies that recognise this dual transition of how they operate and how customers behave will be best positioned to compete.

In many ways, this is a levelling of the playing field. As the consumer journey shifts and old assumptions lose relevance, the advantage moves to brands that are loved, teams that are agile and cultures that are built to test and learn. These are also the qualities we at Verdane look for when backing the next generation of growth companies.





## Methodology

This online survey was conducted in collaboration with leading provider Norstat using their online panels. A total of 7,282 respondents across the UK, Germany and the Nordics (Sweden, Norway, Denmark and Finland) participated in the survey, all within the defined age range. A minimum of 500 qualified responses were collected per market.

Qualification was based on the use of conversational AI tools: individuals who reported using such tools more than once a month, either personally or professionally, were classified as active users and completed the full survey. Those who did not qualify answered a shorter version focused on their AI usage and barriers to adoption. Fieldwork was conducted in June 2025.

- Survey type: Online
- Markets: Sweden, Norway, Finland, Denmark, UK, Germany
- Total base (all markets): 7,282
- Qualified (completed full survey): 3,062
- Fieldwork period: June 2025

## Get in touch

Want to keep the conversation about the future of AI and marketing going? Get in touch with our AI team at:

**Alsurvey@verdane.com**

**Press contact: press@verdane.com**

### Report author:



Ville Polvinen  
Senior Manager, AI-driven Consumer Growth,  
Verdane

## About Verdane

Verdane is an independent specialist growth investment firm that partners with tech-enabled and sustainable European businesses. Verdane can invest as a minority or majority investor, either in single companies or through portfolios of companies, and looks to invest inside two core growth themes; digitalisation and decarbonisation. Verdane has more than €8 billion in assets under management and its funds have made over 200 investments in fast-growing businesses since 2003. Verdane’s team of over 150 investment professionals and operating experts, based out of Berlin, Munich, Copenhagen, Helsinki, London, Oslo and Stockholm, is dedicated to being the preferred growth partner to tech-enabled and sustainable businesses in Europe. Verdane is a UN PRI signatory and also a certified B Corporation, the most ambitious sustainability accreditation globally. The firm only backs businesses that pass its 2040 test, which indicates whether the company can thrive in a more sustainable future economy. Additionally, the Verdane Foundation, which is managed by the group, focuses on supporting sustainability globally and inclusion locally.