

Emerging trends in consumer AI adoption in Europe 2026 update

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Email
Alsurvey@verdane.com

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

Web
verdane.com

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Executive summary

94% of active users expect their private usage to remain stable or increase over the next six months



Consumer use of conversational AI continues to accelerate, with private usage now firmly outpacing professional adoption. In this second edition of Verdane’s study on consumer AI usage, covering 6,488 individuals aged 18–60 across Sweden, Norway, Denmark, Finland, Germany and the UK, nearly half of all respondents report using conversational AI privately at least weekly, an increase of 8 percentage points since June.

Usage at work has also increased, but remains secondary to private use. UK leads adoption, followed by Sweden, Norway and Denmark. In Germany private usage is on par with the Nordics, while professional usage is lower. Finland trails the other Nordics in both adoption and daily usage.

AI seems to solidify its role in the lives of consumers. 94% of active users expect their private usage to remain stable or increase over the next six months, reinforcing the view that recent adoption gains are structural rather than temporary.

A central finding of the study is the growing role of conversational AI in shopping-related decision-making. 82% of active users have used AI to research or compare products and services, with nearly one in five doing so most of the time or every time they consider a purchase.

AI is most frequently used when comparing alternatives, which is also where satisfaction is highest, reflecting confidence in AI’s ability to synthesise information and adapt recommendations to individual context.

Compared to last summer, consumer electronics has overtaken travel as the most common category for AI-supported shopping. Notable increases are also seen in home appliances and furniture, beauty and personal care, and automotive. 16 out of 17 surveyed categories show increased AI usage, indicating that conversational AI is becoming a broadly applicable support tool in purchase research rather than remaining confined research-heavy categories.

This behavioural change is beginning to affect where consumers start their information journeys. 33% of active users now prefer conversational AI over traditional search engines when seeking information, reflecting a shift away from link-based discovery toward direct, synthesised answers.

For companies, this introduces both opportunity and risk: while AI-driven traffic remains difficult to trace and often zero-click in nature, users who do arrive from AI environments show high intent.

Taken together, the findings point to a meaningful change in how consumers research and decide what to buy. While most purchase journeys still take place without AI involvement, high satisfaction with AI as a shopping companion and increased private adoption underline the need to treat AI chats as a relevant touchpoint in the customer journey and an emerging customer acquisition channel.

Building a strong brand and delivering products or services that customers genuinely love remain, while companies increasingly have opportunities to take agency over their visibility in AI-generated answers through actions such as improving product information and using structured data.



Key statistics

Key definitions

Conversational AI: chat-based interaction with Large Language Models, e.g. ChatGPT, Gemini, Copilot.

Active AI user: Respondents who over a short qualifying questionnaire gave consistent answers over multiple questions confirming they use conversational AI at work and/or privately at least monthly and answered the full survey. N=3167

Daily AI use: share of all respondents who answered with option “daily” when asked about how often they use conversational AI.

Weekly AI use: share of all respondents who answered with options “Daily, Several times a week, or About once a week” when asked about how often they use conversational AI.

- Daily private AI use by market, change from June 25 in parentheses: SE 17% (+4pp), NO 15% (+5pp), DK 14% (0pp), FI 9% (+1pp), UK 19% (+6pp), DE 14% (+1pp)
- 94% of all active conversational AI users anticipate maintaining or increasing their private usage.
- Private AI use is more common (49% of all respondents use at least weekly) than work usage (38% of all respondents)
- 52% of active AI users expect their use of AI in their private life to grow in the next 6 months.

- 33% of active AI users now prefer a conversational AI tool over a search engine for finding information.
- Among active users of AI, 82% have used AI to research a product and 18% do so frequently.
- Consumer electronics is the category where most AI users have used AI (30%), followed by travel (28%), and home appliances and furniture (19%)
- 40% of active users of AI in the UK include AI in their purchase journey either every time or most of the time. 11% of active AI users in the UK use AI every time they consider a purchase.

- 39% of respondents have never used AI at work, while 22% have never done so privately.
- Among active AI users, 58% identify as white-collar workers and 15% as blue-collar, with 12% identifying as students.

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

Foreword

To capture developments since last summer, we re-ran the survey across the same six markets. In total, 6,488 respondents took part, of whom 3,167 were classified as "active conversational AI users", defined as using such tools at work or privately at least monthly, based on consistent responses to qualifying questions. These qualified active AI users were presented with the full survey covering detailed personal usage, with particular emphasis on shopping-related behaviour.

Unless otherwise specified, whenever referencing "Active AI users", we refer to these 3,167 respondents. Rather than treating AI adoption as a single phenomenon, this study looks at where AI fits into real consumer journeys, and how that role differs by use case and category. Alongside the survey findings, the report incorporates perspectives from Verdane's portfolio of growth companies, which are navigating these shifts in customer behaviour in practice.

These behavioural changes coincide with significant advances in the features and capabilities of leading conversational AI tools such as ChatGPT. Beyond improved personalisation and context retention, a growing set of partnerships is enabling purchases to be completed directly within the chat interface. While at the time of writing these transactional capabilities are not yet available in Europe, the OpenAI x Shopify partnership, along with Google's Universal Commerce Protocol are indications of where consumer expectations and platform strategies are heading.

Rapid developments in the capabilities of AI models, along with growing consumer adoption of the technology, continue to reshape consumer behaviour, challenge established habits and redefine purchase decision processes. For consumer-facing companies, this raises a fundamental question: how does customer behaviour change when conversational AI, defined here as chat-based interaction with LLMs like ChatGPT, Gemini and similar, becomes part of everyday decision-making?

In the summer of 2025, Verdane conducted a survey of over 7,000 respondents from Sweden, Denmark, Finland, Norway, Germany and the UK to better understand how consumers were starting to use conversational AI in their private lives. The results suggested that private use was already widespread, and that some consumers were beginning to turn to AI not just for information, but also for support when researching purchases. **This prompted a follow-up question that sits at the heart of this report: how fast is this behaviour evolving, and what does it mean for companies that rely on digital channels to reach customers?**



For consumer-facing companies, the rapid pace of change is encouraging a wait-and-see approach. On the one hand, active AI users already rely on conversational AI as a trusted source when researching and deciding what to buy, warranting attention and action from companies seeking to meet customers where they are. On the other hand, limited transparency around visibility within AI chat interfaces, and uncertainty over which actions will prove most impactful, make it tempting to continue business as usual. Today, visibility in AI chats is largely organic, but signals from platform providers suggest that commercial models, including advertising, are likely to follow, including in the EU.

OpenAI is set to monetise visibility through advertising, beginning with a limited US trial potentially rolling out broadly over time. Google, meanwhile, already operates an established advertising platform into which AI mode and Gemini are integrated. How these are introduced in practice, and crucially how they are perceived by users, will have a significant impact on trust and long-term effectiveness of the channels as customer acquisition levers. Once in-chat purchasing becomes a reality in the EU, companies that remain on the sidelines will leave significantly more revenue on the table than they do today. For this reason, we recommend that commercial leaders begin testing and upskilling now to build organisational readiness.

While this environment can feel unfamiliar compared to the customer acquisition playbook of the past decade, companies do have agency. Decisions around brand, product and data quality continue to matter. Strengthening structured data, improving product information, and creating content that actually helps customers are steps that many companies are already taking. Providing product information that is relevant to specific context that goes beyond listing specifications helps AI surface products in searches that are much more context rich rather than focused on specific keywords.

Products and services that customers genuinely value, talk about on forums and review positively remain more likely to be surfaced by AI systems. Strong brands have an edge in terms of visibility, because Large Language Models (LLMs) filter and recommend based on signals of credibility. Brand strength can result in increased inclusion in results when acting as a trust signal. There's also the human element involved. Existing brand awareness can shape the consumers prompt, and having a recognizable brand can lower the consumer's cognitive load at the moment of choice even when an AI chat is used to narrow down options. These fundamental advantages compound, regardless of the exact format of future acquisition channels.

In the grand scheme of things, traditional search engines are still the go to place for finding information. Google is estimated to handle 16.4 billion searches per day, whereas mid-2025 reports pointed to over 2 billion chats in ChatGPT per day, many of which are not information seeking in nature, but rather relate to LLMs other capabilities such as generating text. The digital marketing playbook is therefore not obsolete overnight, nor are companies that have not yet acted on AI visibility permanently behind.

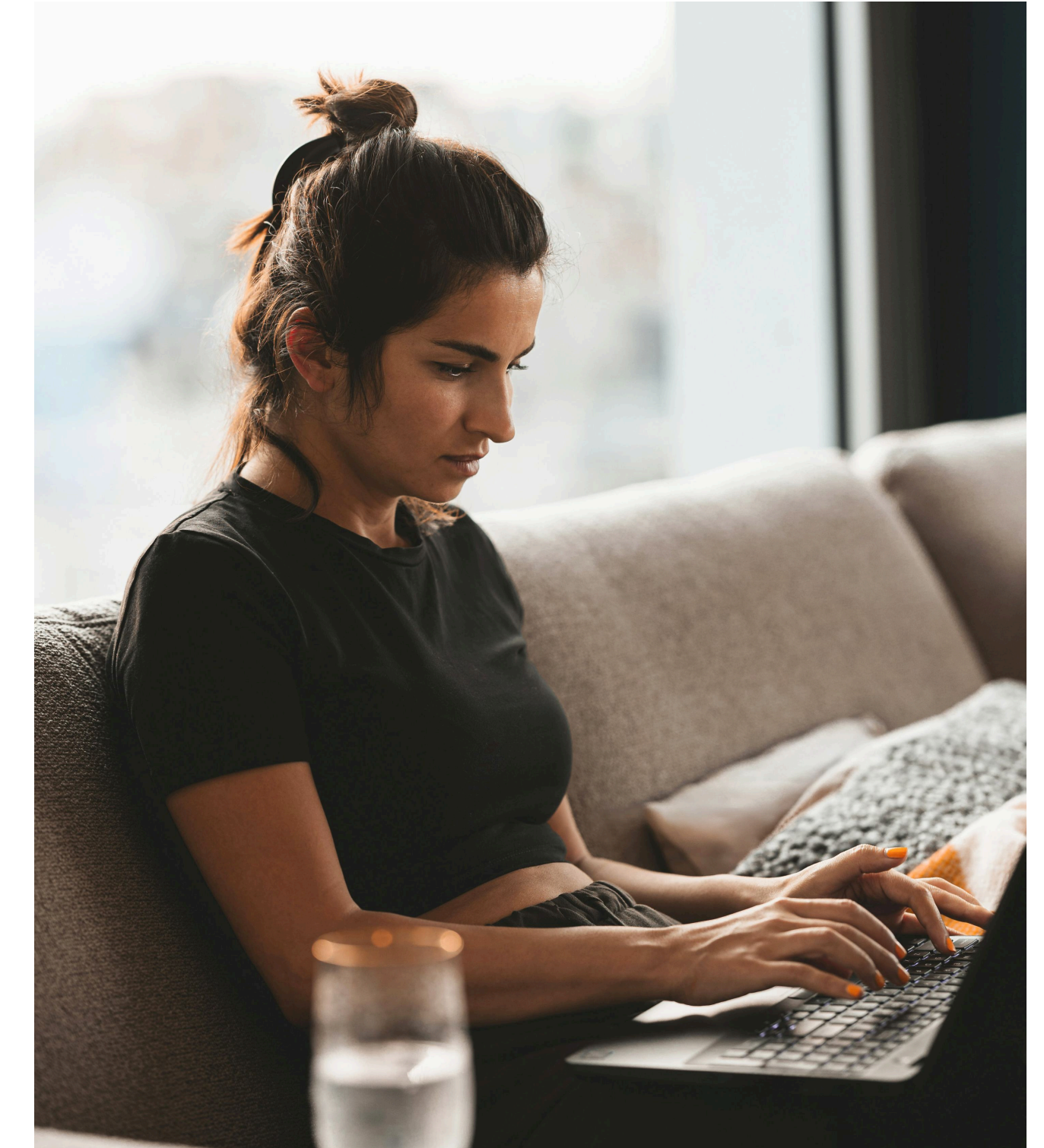
The question is less whether AI replaces existing channels, and more how it changes their relative importance along the customer journey. Conversational AI is particularly suited to situations that require context, comparison and synthesis, which makes it most relevant in parts of the journey where consumers are narrowing choices and forming preferences.

Conversational AI will not be relevant in every purchase journey, but the evidence shows it is a meaningful touchpoint in many. The challenge for companies is to understand where AI matters for their customers today, where its role may expand next, and how to respond without overreacting or standing still. Forward-looking brands that include AI environments in their customer acquisition toolkit can in the near term benefit from relatively low-cost visibility, at a time when visibility is shaped by more than advertising spend alone.

The opportunity is reminiscent of other historic arbitrage moments such as the early days of low Cost-per-Click for advertising on Google, or the advent of influencer marketing. Companies that experiment, have strong Search Engine Optimisation (SEO) fundamentals and earn Massive Customer Love through customer advocacy on third-party sites are best positioned to succeed as the space matures.

If 2025 was the year AI appeared on the radar of shoppers and marketers as a relevant platform for shopping, driven by new commerce features from players such as OpenAI and Google, then 2026 is shaping up to be the year when questions around AI-mediated commerce move from hypothetical to practical. Execution details will often sit with technology teams, but decisions about channel mix, customer acquisition and brand positioning remain commercial at their core.

In a landscape with many unknowns, this report aims to provide a grounded basis for discussion, highlighting both the opportunities and the constraints companies face as conversational AI becomes part of the consumer decision-making on shopping related matters.



“The question is less whether AI replaces existing channels, and more how it changes their relative importance along the customer journey.”

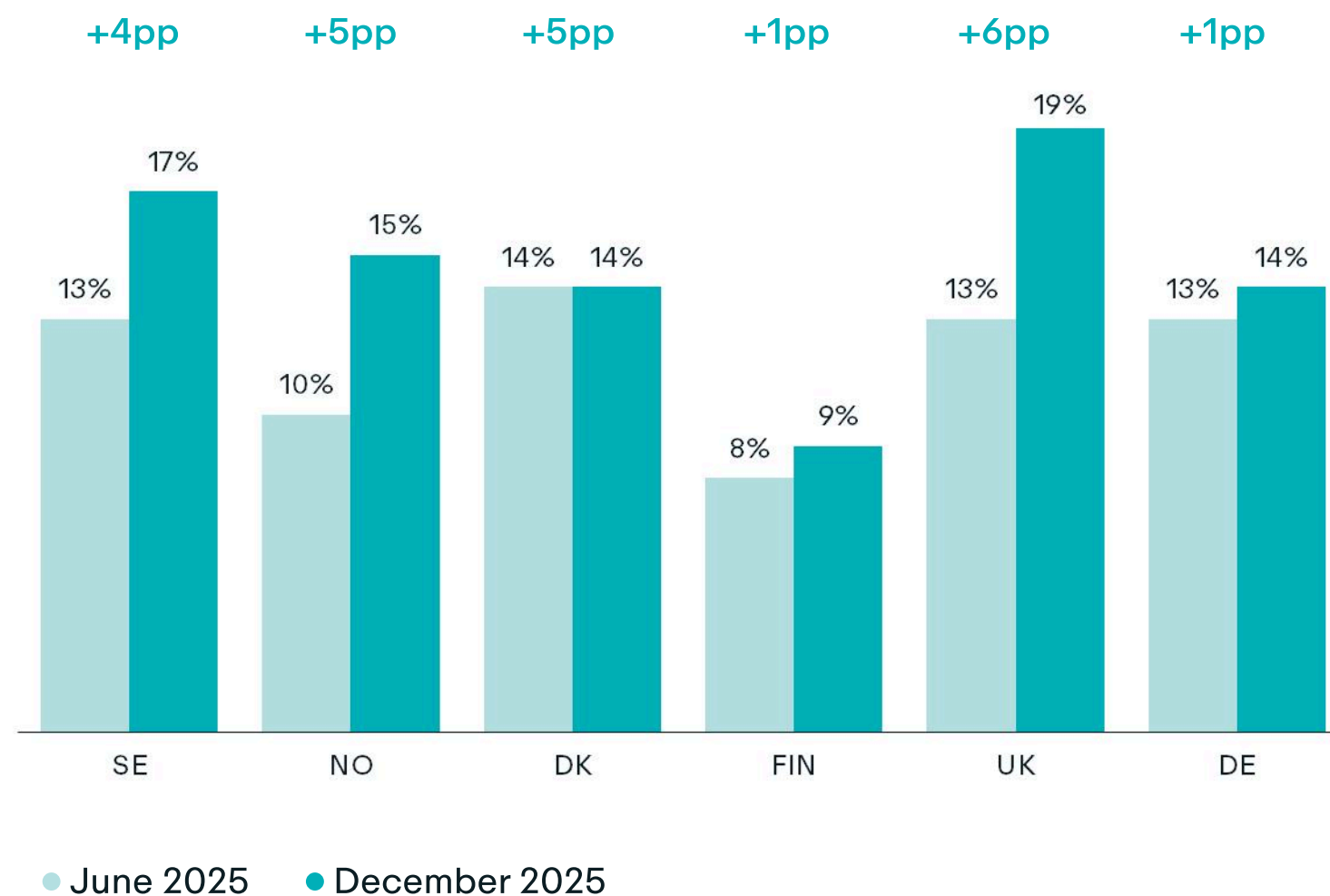
Private use, not work, is driving consumer adoption of conversational AI

Daily active use of conversational AI sees an increase across all markets since last summer in our most recent study of 18 to 60 year olds in Sweden, Norway, Finland, Denmark, Germany and the UK, with private use being more prominent than work related usage. Private adoption continues to lead, with 49% of respondents using conversational AI privately on a daily or weekly basis (+8 pp from June), compared with 38% using it at work (+4pp from June).

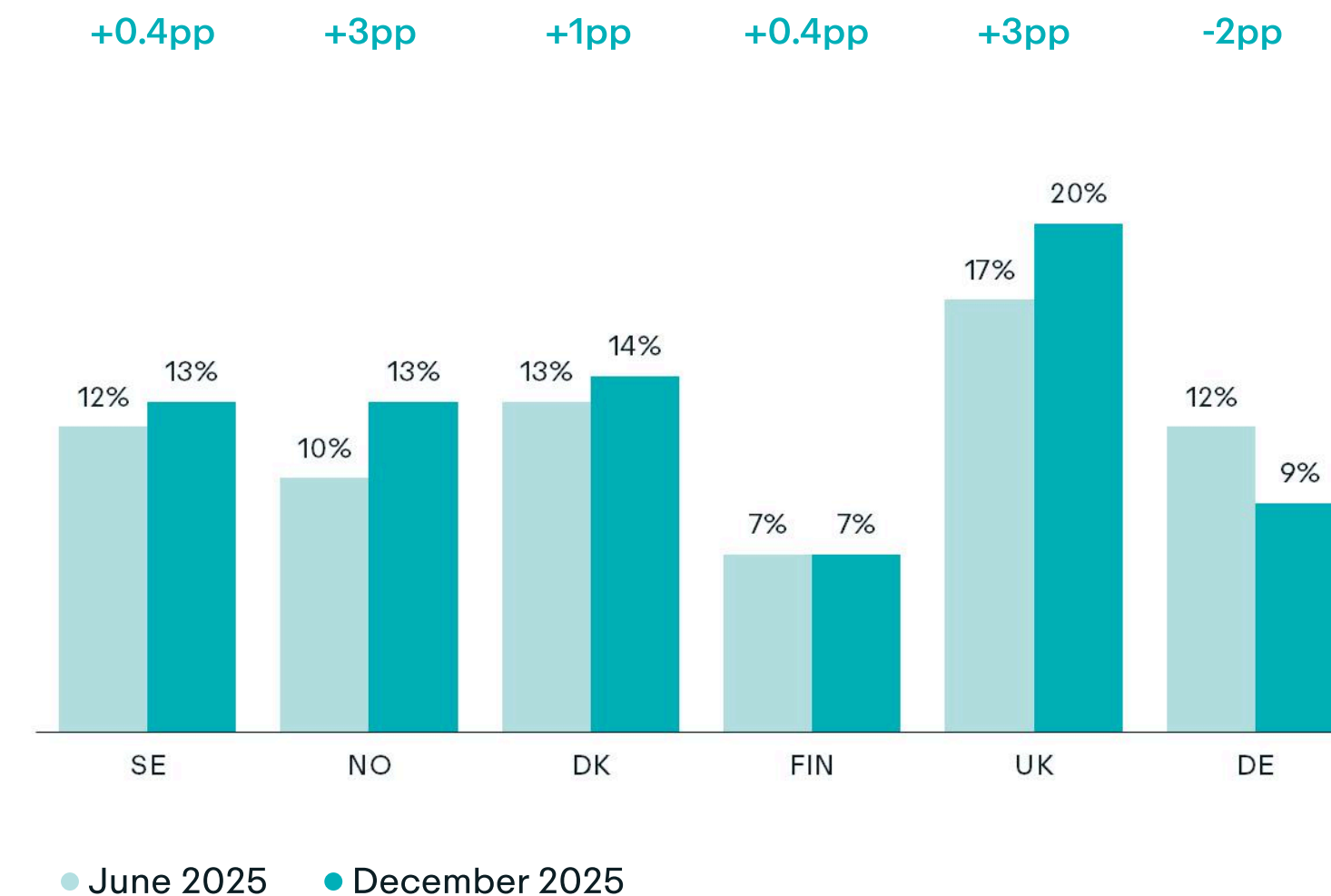
Daily private use is highest in the UK, where 19% of respondents report using AI every day, and lowest in Finland at 9%. Across all markets, average daily private usage stands at 15%. For professional use, daily use is again highest for UK (20%), with the average across all markets being 13%. Private use cases, such as the shopping related ones at the focus of this study, are distinct from professional use cases and applicable regardless of ones professional background, which we believe to be a main driver for higher private use.

Similarly, professional usage may be restricted by policies and access restrictions beyond the control of the individual, whereas the most common conversational AI tools can be accessed for free on any smartphone or similar personal device, lowering the bar for adoption. This interpretation is supported by OpenAI's own research from September 2025, which suggests that roughly 70% of ChatGPT usage volume is non-work related.

Daily private use of AI by country



Daily AI use at work



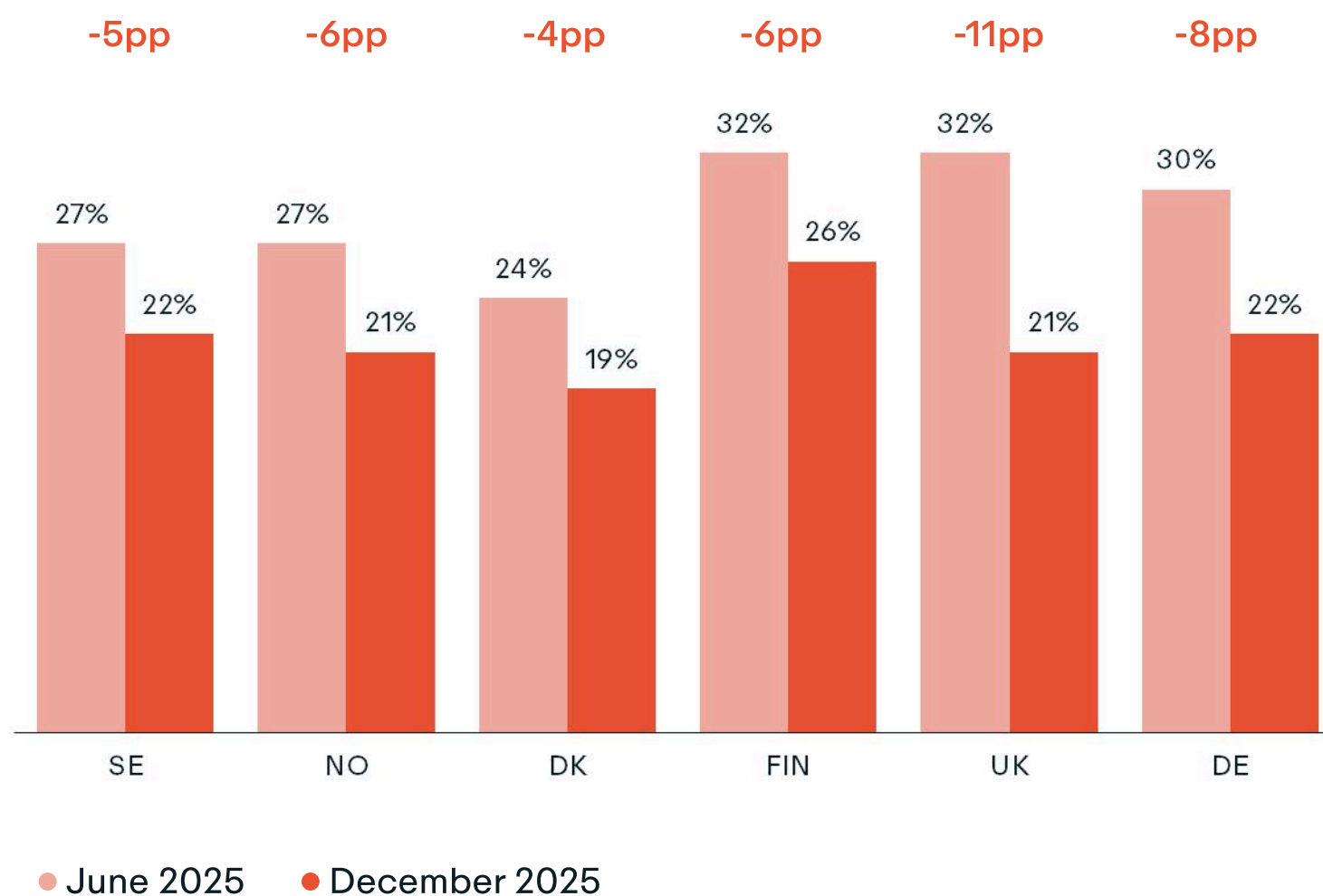
Patterns of adoption across the studied markets

Complementing daily active use, examining the share of population aged 18-60 who have never used AI highlights three key patterns. First, adoption is increasing across all markets, including among infrequent users. Since the June 2025 survey, the share of respondents who have never used conversational AI has declined meaningfully in every market. The largest decreases are seen in the UK (11pp) and Germany (8pp), with more modest declines in Denmark (4pp) and Sweden (5pp). Denmark now has the lowest share of respondents who have never used AI.

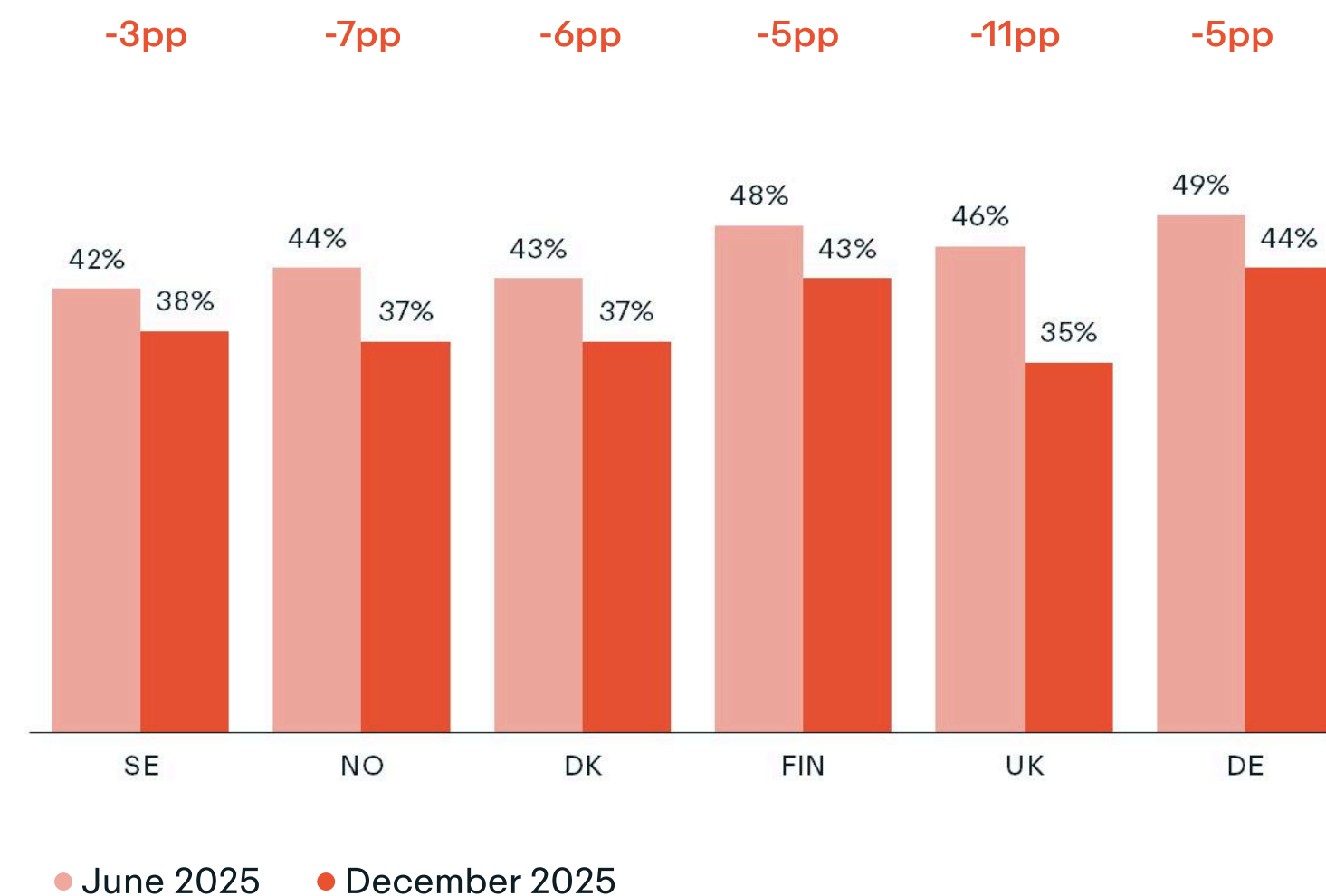
Second, private adoption is both more widespread and evolving faster than professional use. While all markets show a declining share of respondents who have never used AI at work, these changes are smaller in magnitude, with only the UK recording a double-digit decrease since June. Third, distinct market patterns are emerging. Sweden, Norway and Denmark appear to be converging, with only minor differences in daily usage and non-adoption rates, both privately and professionally.

The UK stands out as the most advanced market, now leading in daily private use after overtaking Denmark, and also showing the highest share of daily professional users. It has seen the sharpest decline in the share of the population that has never used AI, indicating rapid adoption across both early and late adopters.

Have never used AI privately



Have never used AI at work

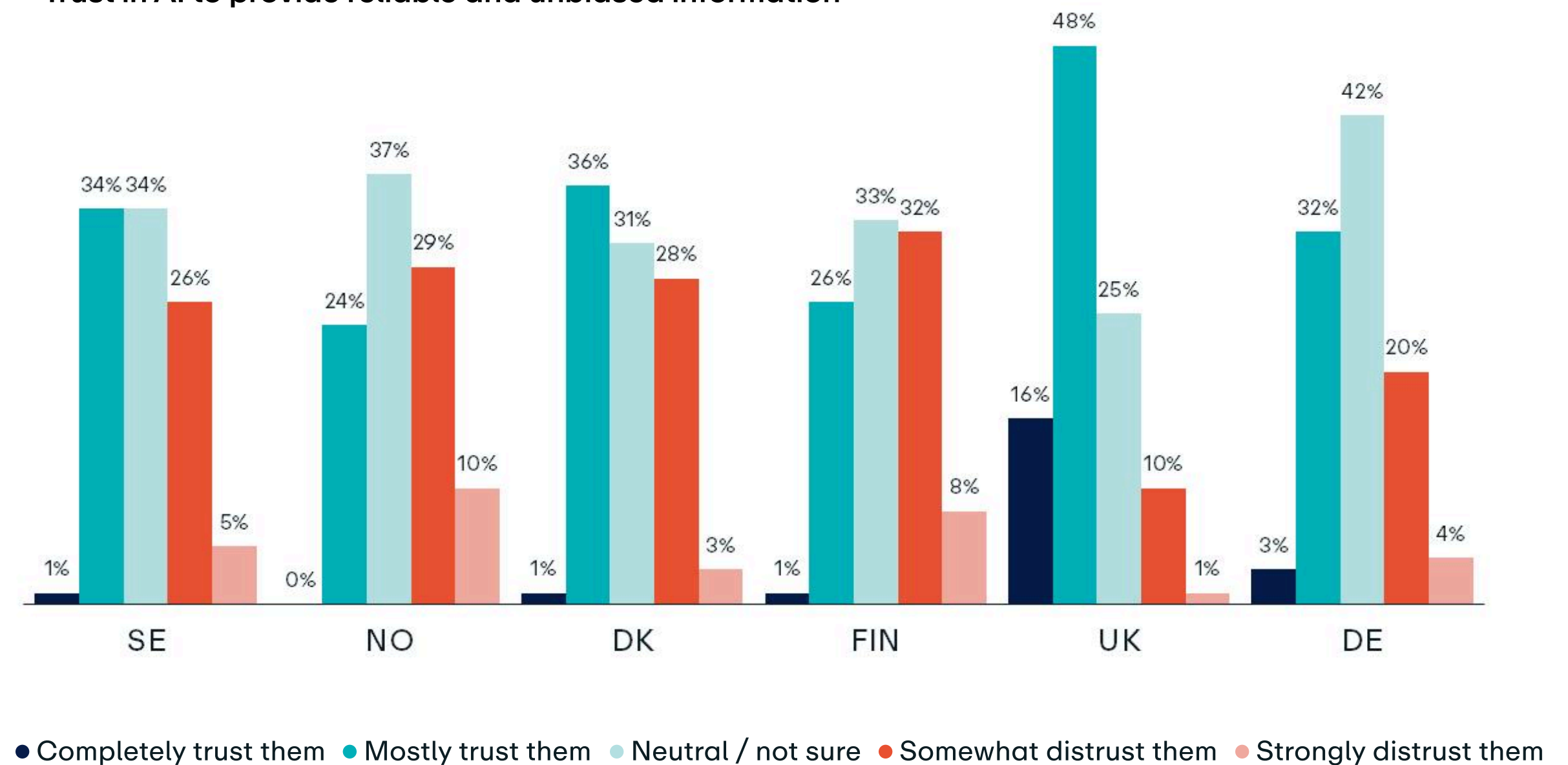


Finland is the clear laggard, particularly in daily usage, with both private and professional daily adoption materially lower than in the other Nordic markets. When weekly use is included, private adoption is increasing, but growth in professional usage is notably slower. This is partly explained by a lower share of white-collar respondents in the Finnish sample, which may bias results.

On the private side, the pace of adoption is similar to the other Nordics, with December 2025 levels roughly matching the Nordic markets six months earlier. 59% of active Finnish users expect their private usage to increase over the next six months signaling slower but growing adoption.

Perceived trust in AI’s ability to provide accurate and unbiased information remains a key enabler of adoption. The UK stands out as the market where users express the highest levels of trust, while Nordic users are more reserved. Finnish respondents are the most skeptical among active users, and a statistically significant share of non-adopters (33%) cite concerns around reliability and bias as a major barrier to adoption.

Trust in AI to provide reliable and unbiased information



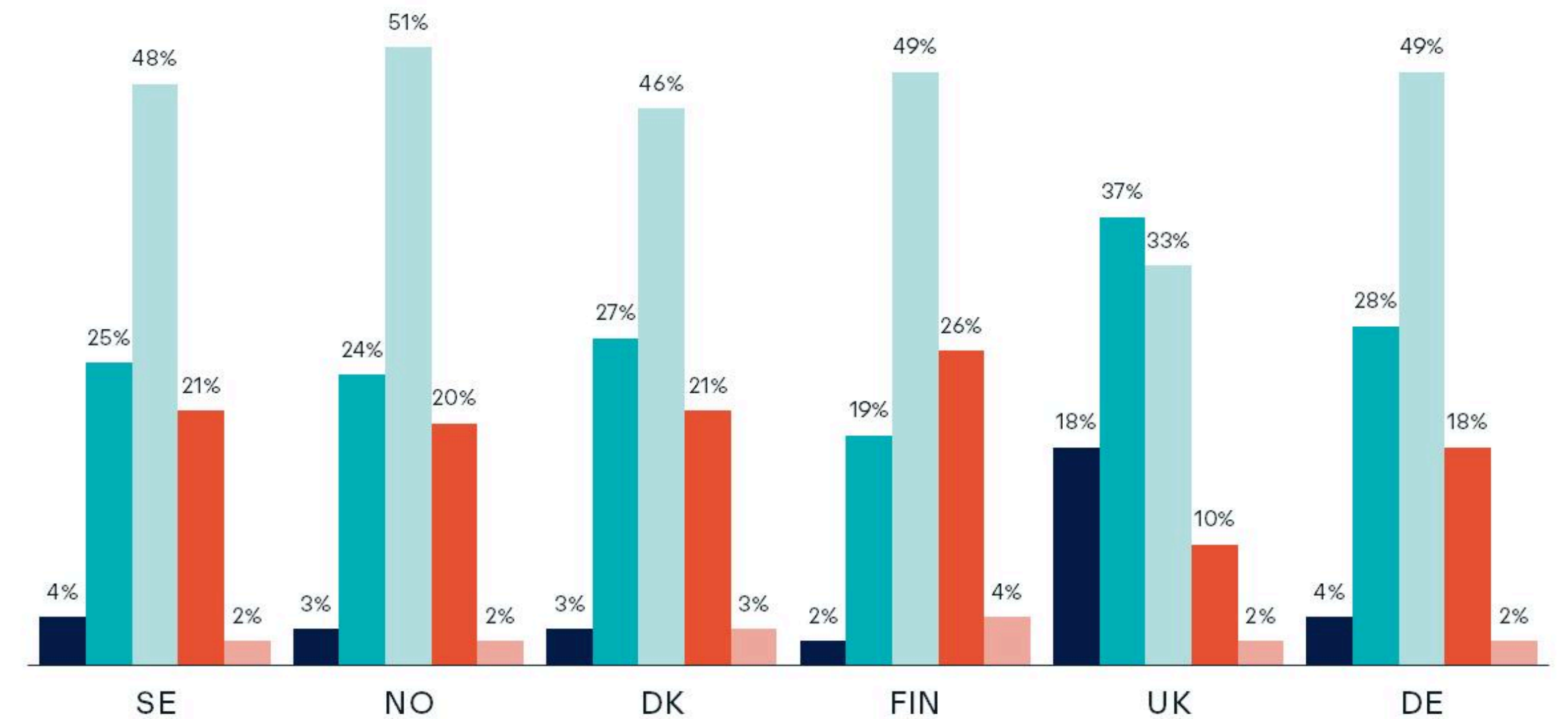
AI is no longer just a support tool, but an alternative starting point for finding information

For long, search engine queries have been the go-to for consumers and marketers alike, and as such performance marketing budgets have long flowed to Google to ensure visibility and good placements on the platform. Our findings show that this behaviour is beginning to shift. In our survey **33% of active users turn to AI more often than traditional search engines**, up 3pp from June. This figure is the highest in the UK (55%), and the lowest in Finland (21%).

The reasons for preferring AI are consistent with earlier findings. Easier ability to ask follow-up questions (60%), direct answers without needing to navigate through links (57%), and a better ability to summarise complex topics (56%). Conversely, for the two thirds who still prefer traditional search engines most of the time, perception of AI's tendency to fabricate information or make mistakes was the leading reason at 49%, overtaking being more used to search engines that was the leading reason back in June.

Google's rollout of AI overviews further blurs the distinction between search and AI, as users are increasingly exposed to AI-generated answers even without explicitly choosing an AI interface.

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



● Completely trust them ● Mostly trust them ● Neutral / not sure ● Somewhat distrust them ● Strongly distrust them

This shift fundamentally challenges how companies understand visibility and measure impact

As reliance on AI chats and AI-enhanced search results increases, consumers are more likely to find the information they need without visiting a website. As consumers turn to AI chats and AI overviews increasingly, traffic to websites is expected to decline. Assuming a steady underlying demand, this could translate into lower traffic but at higher conversion rate for direct and LLM referral traffic by comparison. For companies, the implications are twofold.

Growth models that rely on traffic expansion become harder and potentially more expensive to sustain. At the same time, understanding the customer journey becomes more difficult when users may never interact directly with owned digital touchpoints, even if they ultimately choose the company's product or service.

Data on AI visibility is more scarce than with Search Engine Optimisation (SEO), and while the Answer Engine Optimisation (AEO) technology landscape is evolving, gaining an understanding of a mostly untraceable customer journey means piecing together information from different sources.

This untraceable customer journey is reminiscent of the challenges B2B companies face in their marketing and attribution. Based on our work with Verdane portfolio companies, an emerging playbook for understanding AI visibility rests on three pillars.

First, monitoring referral traffic from LLMs where available, even if volumes are currently low. These users tend to be high intent and convert well.

Second, conducting simple audits of commonly asked questions in popular AI tools and tracking Share of Answer to understand relative visibility versus competitors.

Third, including AI as an option in self-attribution questions, such as "Where did you hear about us?", to build directional insight into the role AI plays in customer acquisition.

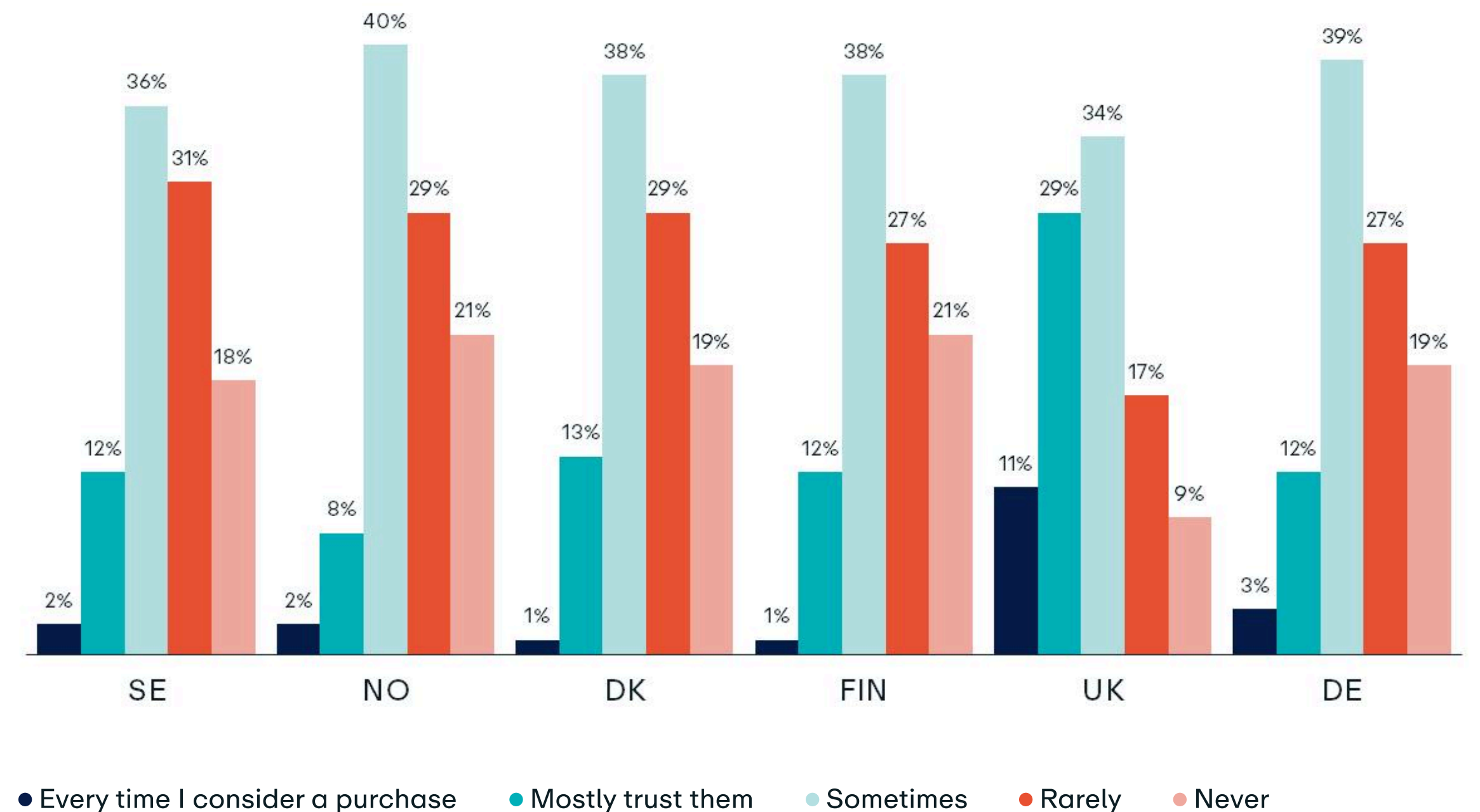
AI-assisted shopping is becoming normal behaviour among active AI users

Verdane’s previous study into consumer AI usage last summer found that active users of AI use it also for shopping purposes, and we expected shopping usage to grow in popularity. Our latest findings confirm this. **82% of active AI users have used AI to research or compare products or services**, up seven percentage points since June. Nearly one in five, 19%, use AI every time or most of the time when considering a purchase, marking a further increase.

At the same time, AI is not present in every purchase journey. 38% of active users rely on AI sometimes, reinforcing the view of AI as a meaningful touchpoint rather than a universal default. As consumers gain experience and hear about positive use cases from friends and family, the share of users who never use AI for shopping is likely to continue declining.

The UK serves as one potential future scenario of where behaviour may head over time for other markets as well. Among active AI users in the UK, only 9% have never used AI for shopping, while 40% consult AI every time or most of the time when considering a new purchase.

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



AI delivers the most value in stages that require comparison and context

AI is used across the purchase journey, from discovery and comparison of options to price checking and supporting the final decision. Across all markets, comparing alternatives or researching options is where AI is used most frequently and where satisfaction is highest. Between 60% and 76% of users report that AI meets their needs well or very well at this stage, with UK shoppers again reporting the highest satisfaction.

In our view, this reflects a core strength of large language models: the ability to connect product attributes with user-specific context and needs. For companies, this highlights the importance of high-quality product information that AI systems can interpret and use in responses.

This is also where most of Verdane's consumer portfolio companies have focused their initial efforts to remain visible in AI-driven discovery. Using structured product data was the most commonly cited Answer Engine Optimisation tactic in 2025 among Verdane companies.

Finding the best price remains AI's weakest point, and that creates room for differentiation

The stage where AI struggles most is price comparison. Between 4% and 17% of users, depending on the market, rate AI's performance in finding the best price as poor or very poor. While this can be frustrating for highly price-sensitive consumers, it also has an important implication for companies. Visibility in AI-generated answers is not driven by price alone, leaving room for differentiation through other attributes such as relevance, suitability and perceived quality.

Many consumers already trust AI with the final purchase decision

A final noteworthy finding relates to decision-making itself. Between 70% and 90% of active AI users, depending on the market, report having made a purchase decision based on input from AI. Satisfaction with AI at this stage is highest in the UK, where 70% say AI meets their needs well or very well. Satisfaction is lower in Finland and Norway, at 36% and 39% respectively.

With the ability to complete purchases directly in chat interfaces on the horizon in both ChatGPT and Gemini, these findings set the foundation for AI chats becoming a relevant part of the channel mix. Many consumers already trust AI with the decision, even if the transaction still takes place elsewhere. As this point of friction is removed, traceability of AI-influenced purchases improves, and the business case for investing in AI visibility becomes clearer for more companies.

“Visibility in AI-generated answers is not driven by price alone, leaving room for differentiation through other attributes such as relevance, suitability and perceived quality”

AI will not be part of every purchase, but awareness is increasing

Despite growing adoption, AI is unlikely to be relevant in all purchase situations. Among users who have used AI for shopping, the most commonly cited limitation is the need to see or touch the product, at 36%, followed by AI not considering all factors that matter to them when making recommendations, at 34%. While the former is likely to persist, improvements in how AI tools remember preferences and user profiles could reduce the latter over time.

Among active AI users who have never used AI in shopping, the leading reasons are not needing help to make purchases, at 37%, and not having thought about using AI in this way, at 35%. In the June 2025 study, the latter was cited by 45% of respondents, suggesting that awareness of AI's role as a shopping companion is spreading, even among those who have yet to adopt the behaviour themselves.

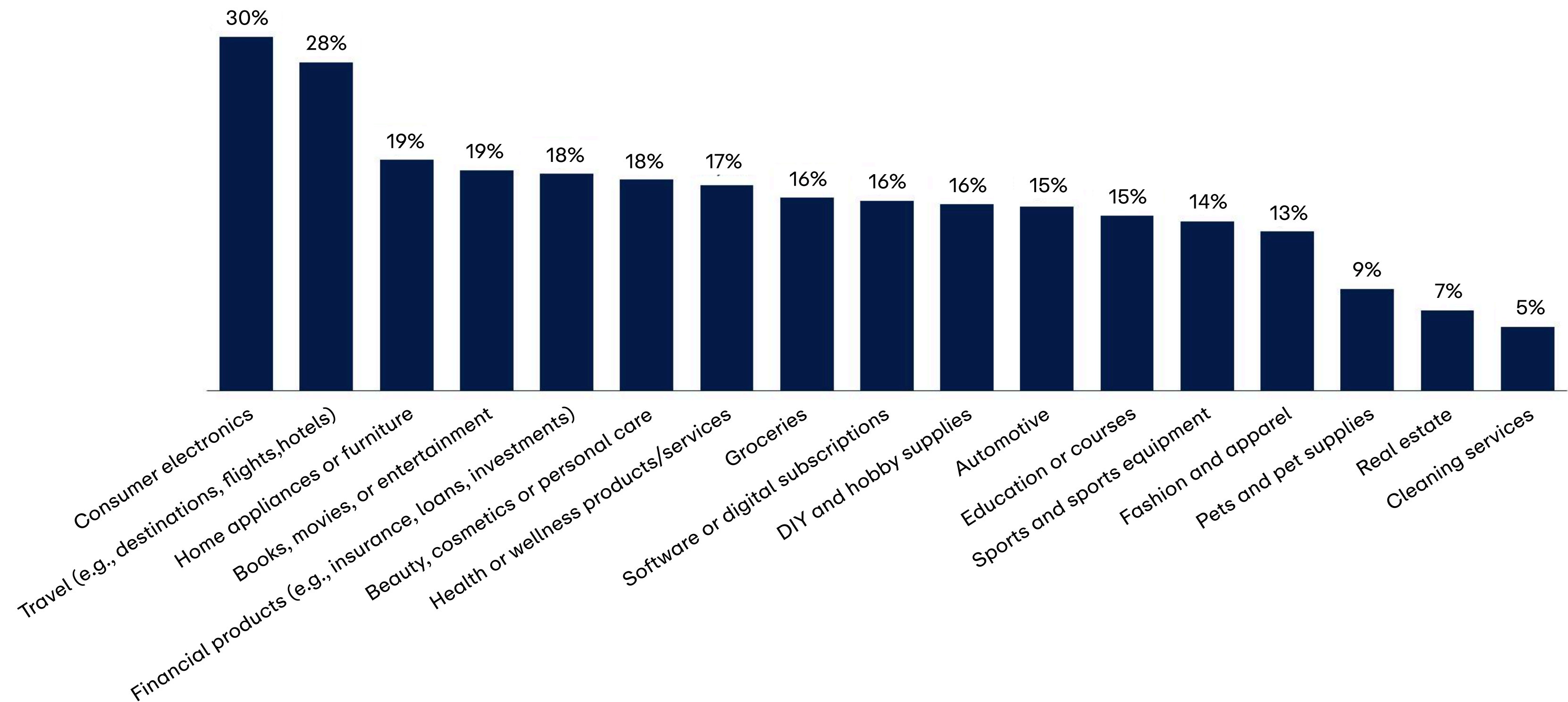
Category insights and perspectives from the Verdane portfolio

In addition to general questions on the use of AI in shopping, active users were asked which product and service categories they have used AI to research or compare. The results show a clear pattern. While adoption is increasing across almost all categories, the pace and depth of AI involvement vary meaningfully depending on how purchases are typically evaluated.

Across the 17 categories included in the survey, 16 saw an increase in the share of respondents who had used AI when shopping compared to last summer. Some of this uplift may be influenced by the timing of the survey, with Q4 being a high-activity period in many categories. While the question covered purchase behaviour over the past 12 months, self-reported data naturally skews toward more recent purchases.

Even with this caveat, the breadth of increase suggests that **AI is being tested and adopted across categories rather than remaining confined to a narrow set of use cases.**

For which types of products or services have you used conversational AI-tools to help you decide what to buy or compare options?



Research-heavy categories continue to lead adoption

Categories traditionally associated with extensive pre-purchase research remain at the forefront of AI-assisted shopping. Consumer electronics has overtaken travel as the most common category where AI is used, with furniture and home appliances also showing strong growth. These are categories where comparison behaviour already exists, and where product attributes can be meaningfully contrasted before purchase. Conversational AI fits naturally into this decision logic by helping consumers narrow options based on specifications, constraints and preferences.

Consumer electronics and furniture & appliances are also examples of categories where structured product information maps well to the strengths of large language models. The ability to contrast features, explain differences and relate product attributes to specific needs is a key reason AI performs well here. This is why our recommendation for companies in these categories is to start their answer engine optimisation efforts with structured product data and clearly defined product attributes. In our discussions with Verdane consumer companies during 2025, this was consistently identified as a low-barrier, high-impact place to begin.

Furniture sits at an interesting intersection. While product specifications matter, visual taste, reassurance on trust factors such as reviews and perceived quality also play an important role. This makes it a useful category for understanding both the potential and the current limits of AI-assisted shopping. The perspective from PremiumXL's Chief Marketing Officer, Mathias Preuss, illustrates how these dynamics play out in practice.

“The ability to contrast features, explain differences and relate product attributes to specific needs is a key reason AI performs well here.”



“Touch and feel” categories are catching up, with clear constraints

A second group of categories sits in the middle of the adoption curve, including fashion and apparel, beauty and cosmetics, and groceries. These categories share common characteristics. Fit, feel, taste and personal preference play a central role in decision-making, making them harder for AI to fully capture. This aligns closely with the reasons consumers cite for limiting AI use in shopping more broadly: the need to physically see or touch products, and the perception that AI does not always account for all relevant personal factors.

“As a result, brand building remains relevant in determining which options remain in contention when consumers move from AI-assisted exploration to human decision-making.”

Despite these limitations, adoption is increasing across these categories compared to last summer. This suggests that consumers are experimenting with AI even where its usefulness is partial, and could potentially be a signal of increased trust towards AI results in a shopping context specifically. For active AI users in our survey, AI often supports early-stage exploration, inspiration or narrowing of options in these categories especially.

At the same time, brand strength plays a growing role in how these AI-assisted journeys resolve. When AI is used mainly to narrow options rather than decide outright, well-known and trusted brands are more likely to be surfaced, require less justification, and feel safer at the moment of choice. As a result, brand building remains relevant in determining which options remain in contention when consumers move from AI-assisted exploration to human decision-making.

For companies operating in these “touch and feel” categories, the implication is not to expect AI to do everything, but to ensure that core product information works well for both humans and machines. Clearly written product descriptions, structured FAQs, information on materials, sizing, availability and delivery are practical measures that improve visibility without assuming a fully AI-driven purchase flow.

It is also worth noting that fashion and beauty are already categories where online purchases are common. As in-chat purchasing experiences mature and roll out in more markets, these categories may continue to see gradual increases in AI involvement.

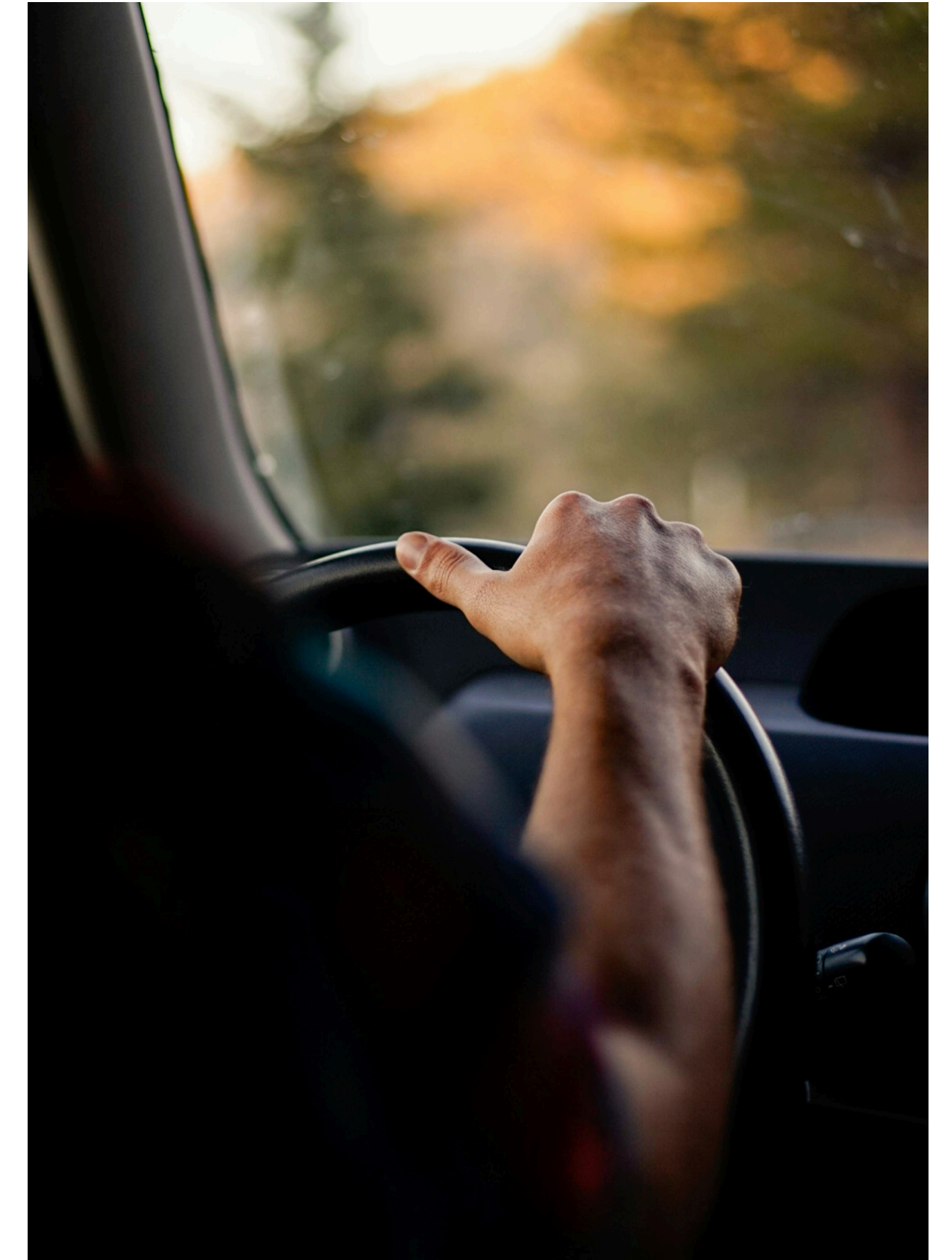
The perspective from Lumene’s Regional Director UK & Global E-commerce, Axel Nyström, provides a concrete example of how AI is beginning to resemble a personalised advisor in beauty, and how this shifts the importance of brand-owned product content.

High-ticket categories show early but meaningful AI use

A third group of categories includes high-ticket purchases with long decision cycles, such as automotive. In our latest survey, 15% of active AI users had used AI when deciding what to buy or compare options within the automotive category, marking a notable increase from last summer. While completing high-value purchases directly through AI interfaces is unlikely in the near term, AI already plays a meaningful role earlier in the journey.

In these categories, consumers often turn to AI to diagnose problems, understand compatibility, compare options and reduce uncertainty. Even if the final transaction happens elsewhere, these interactions shape consideration and preference. For brands operating in such categories, visibility in AI-assisted research becomes strategically important, even if click-through volumes decline.

The perspective from Lars Thomte, Chief Marketing Officer at the Norwegian car parts retailer bildeler.no, illustrates how AI-driven discovery can reduce low-quality traffic while increasing the share of high-intent visits, and why structured, authoritative information is critical in categories with a high cost of error.



Portfolio perspective Furniture



Mathias Preuss
Chief Marketing Officer,
PremiumXL

Company details

Founded	2011
Headquarters	Rheine, Germany
Sector	B2C Products
Partner since	2021

Q: As a German based company, what is your view on the role of AI in shopping for the German market?

A: I think conversational AI has become increasingly established in the German market, particularly as a tool for research and decision support. At the same time, we currently see very limited traffic and conversions coming directly from AI models. The main impact of AI today is less about direct sales and more about influencing customers early in the decision-making process.

“The main impact of AI today is less about direct sales and more about influencing customers early in the decision-making process.”

Q: How do you see AI impacting customer journeys for the furniture category?

A: I think the relevance of AI in the furniture category varies strongly by price segment. In the entry-level price segment, I do not expect AI to become as important as in the premium segment or for highly explanatory products. Where purchases require more consultation, reassurance and quality assessment, conversational AI provides clear value. In contrast, entry-level furniture tends to be more price-driven, with simpler decision criteria.

Q: What action is PXL taking to drive AI visibility?

A: At the moment, we have only implemented a few basic measures, such as the integration of an llms.txt file. As part of our Shopify relaunch, we are now focusing more strongly on improving how products are presented, with the goal of structuring product data more clearly and integrating FAQs. This is intended to make relevant information more accessible to large language models and to gradually improve our visibility in AI-generated answers.

Portfolio perspective

Beauty and cosmetics



Axel Nyström
Director UK & Global E-Commerce,
Lumene Group

Company details

Founded	1970
Headquarters	Espoo, Finland
Sector	B2C Products
Partner since	2021

Q: Beauty and Cosmetics was one of the categories that saw the highest increase in consumer AI usage in shopping in our study. What is your read on the result, and what are the drivers behind the use of AI for shoppers in this category?

A: This makes sense. The beauty and cosmetics categories are high engagement categories where shoppers have always invested time into researching to find the best product for their specific needs, wishes or problem, and also to seek inspiration and to try out new, exciting products and trends. With Conversational AI acting like a beauty consultant/advisor, I'm not surprised that shoppers are using these tools more. The nature of the answers, responses and guidance is of a different kind of explorative journey than through a search engine – more engaging, clear, and reassuring. It's almost like everyone has their own equivalent to a department store beauty advisor, with whom they can have a conversation that leads to decision making that the shopper feels content with. Based on this, the need for a seamless end-to-end shopper journey in Conversational AI-tools is of great importance.

ChatGPT and Shopify is already providing this solution in the US, and the UK is expected to follow shortly.

Q: How is Lumene adapting to these changes in consumer behaviour?

A: For us, this means that we need to enable our products to be in the right consideration set for the shopper. If a LLM ranks Product Detail Page content from our own website higher than from a retailer, there is a shift in the importance of us having the best possible content, compared to a search engine based model where a retailer's website will be ranked higher because of traffic volume. Still, we'd be happy if the purchase of a Lumene product is through a retailer in a Conversational AI-tool, but our role in reaching the point of purchase through right content on lumene.com becomes much greater. That said, we still believe that we need to win wherever people shop. Pre Conversational AI-tools, it's clear that the shopper prefers to shop our products at the same time as other products, hence the importance of winning with retailers/marketplaces. It's yet to be seen how Conversational AI-tools will solve that shopper need.

Q: What are some of the areas you are focusing on to ensure Lumene products come up when consumers engage with their "virtual personal beauty advisors" in conversations with AI?

A: Building a strong brand and making products that consumers love is focus for Lumene and key to success for us and our partners, with or without consumers going through AI. We're working together with Verdane's operational expert team Elevate to get the basics in place from an AI visibility perspective and look to build from this foundation together.

“With conversational AI acting like a beauty consultant/advisor, I'm not surprised that shoppers are using these tools more.”

Portfolio perspective

Automotive



Lars Thomte
Digital Marketing Manager,
Bildeler.no

Company details

Founded	1990
Headquarters	Buskerud, Norway
Sector	B2C Products
Partner since	2021
Realised	2025

Norway is a digitally mature market, and that is reflected also in the results of the study. The adoption of conversational AI is growing and is becoming mainstream, with higher usage in private contexts than at work. Currently, around 50% use AI for product comparison or purchasing. Of these, 15% report using AI for automotive-related products. I think these numbers will grow significantly as AI agents developed fast over time and becomes capable of shopping directly on behalf of customers.

Buying car parts for private customers is complex. Multiple vendors often produce the same part, brand loyalty is low, making it hard to decide when presented multiple choices. And while price matters, fast and correct delivery is critical. Car parts represent a high-intent category with a high cost of error—ordering the wrong part leads to downtime, refunds, and frustration.

“Shopping agents will fundamentally change the customer journey.”

In this context, we think AI will increasingly be used to identify problems and parts: What is the issue? Does it fit my car? What tools do I need? What should I replace at the same time? How do I proceed? When users get the answer directly in AI, we will lose traffic to our website and we already see a decline in organic web search traffic. While this presents challenges, it may also have a positive effect: fewer, but more relevant and purchase-ready visits, leading to higher conversion rates.

When looking at the customer behaviour in the context of our own web shop, the traffic is largely problem-driven or need-based (e.g. brake noise, EU inspection, warning lights) and searches for specific part names. Therefore the customer journey in most cases starts with either an online search or by direct traffic to site due to «top-of-mind». Conversion is then driven by the right price, the promise of fast delivery, clear return policies, and our unique registration number search, which identifies the exact part needed and reduces the risk of incorrect orders.

Off-site AI may generate even fewer clicks in the future, but more qualified ones — potentially reducing traffic while increasing conversion rates. The uncertainty for any web shop today lies in how much of the website traffic will be lost to AI search and how much purchase-ready traffic will be gained.

We are already leveraging on-site AI through our new chatbot and will soon introduce AI-based search to further simplify the customer journey, reduce uncertainty, and lower return rates. I see an enormous potential here to improve our customer journey and increase conversion even more by the use of on-site AI.

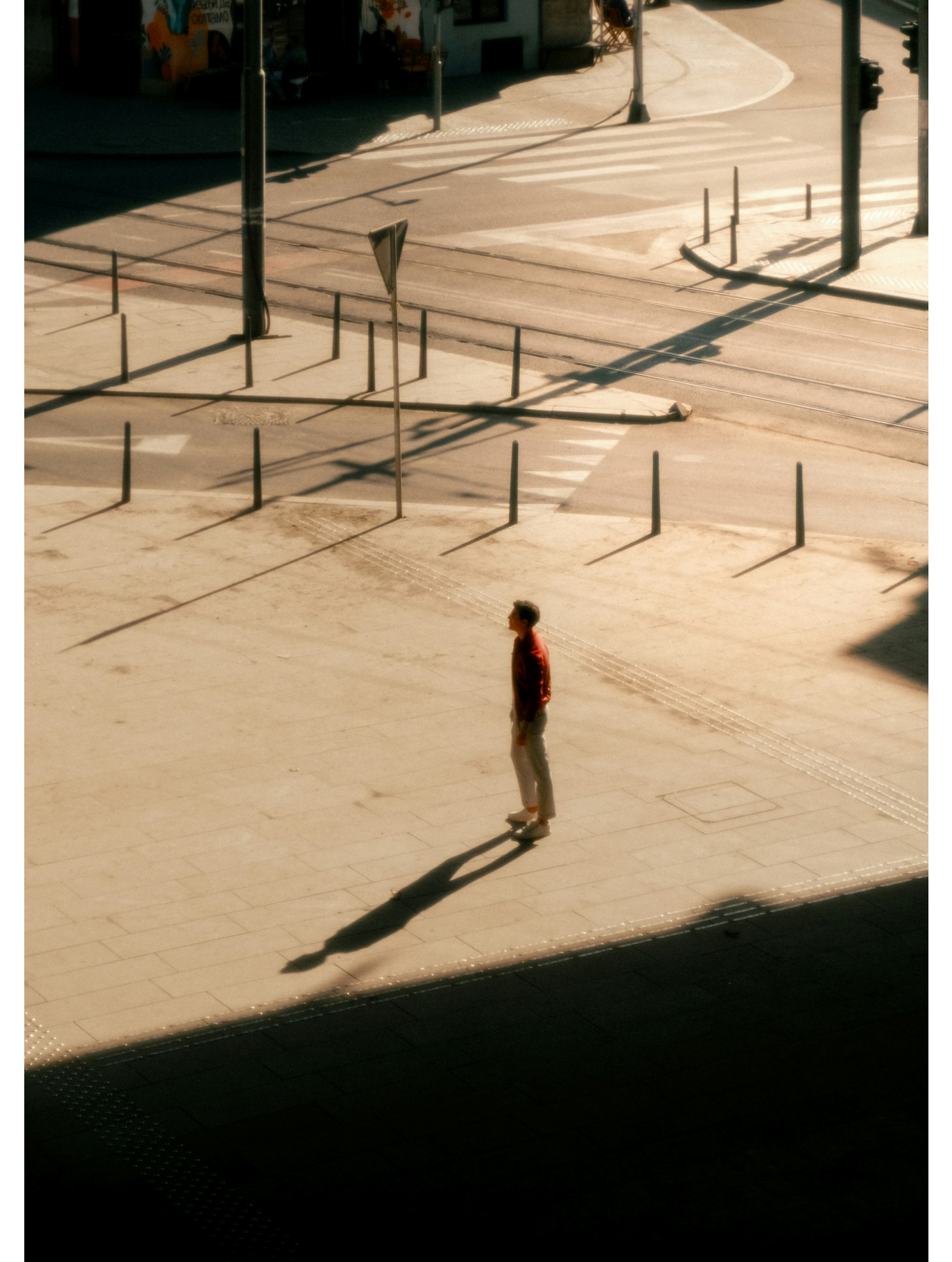
Shopping agents will fundamentally change the customer journey. Ultimately their success depends on continued trust in AI assistants by consumers — trust is critical. After all, in the study, 38% say they don't trust AI yet, and says AI fabricates answers or makes mistakes. In this AI-landscape, our focus must be on being a trusted, citable source through structured data, transparency, and authoritative knowledge in car parts and mechanics. To stay ahead, LLMs should be treated as strategic partners, not just channels.

A look into things to come and setting your company up for success in AI mediated purchase journeys

2025 marked a shift in how consumer-facing companies think about AI. What started as a topic primarily associated with internal efficiency became relevant to customer acquisition and commercial strategy. As shown throughout this report, growing consumer usage and a clearer understanding of Answer Engine Optimisation have enabled brands to influence their visibility in AI chats, and in some markets even unlock AI as a sales channel. Looking ahead, the question is less whether AI matters, and more how companies should prepare for the next phase of development.

“2026 is shaping up to be the year when that potential starts to translate into more concrete commercial outcomes”

If 2025 was the year when forward-looking brands and consumers began to recognise the potential of conversational AI as a shopping companion, 2026 is shaping up to be the year when that potential starts to translate into more concrete commercial outcomes. Two developments in particular stand out: the gradual introduction of in-chat purchasing, and the shift from purely organic AI visibility to models that also include paid placements.



The US offers a preview, not a blueprint

The US market provides the clearest indication of where conversational commerce may be heading. As the home market of the major AI platforms, with high purchasing power and fewer regulatory constraints, it is unsurprising that new features appear there first. Both Google and OpenAI are already advancing AI-driven shopping experiences.

Google has introduced in-chat checkout and conversational shopping tools through Gemini and AI Mode in Search, enabled by the Universal Commerce Protocol. OpenAI has taken a similar step with agentic commerce inside ChatGPT, allowing US users to complete purchases directly from select merchants.

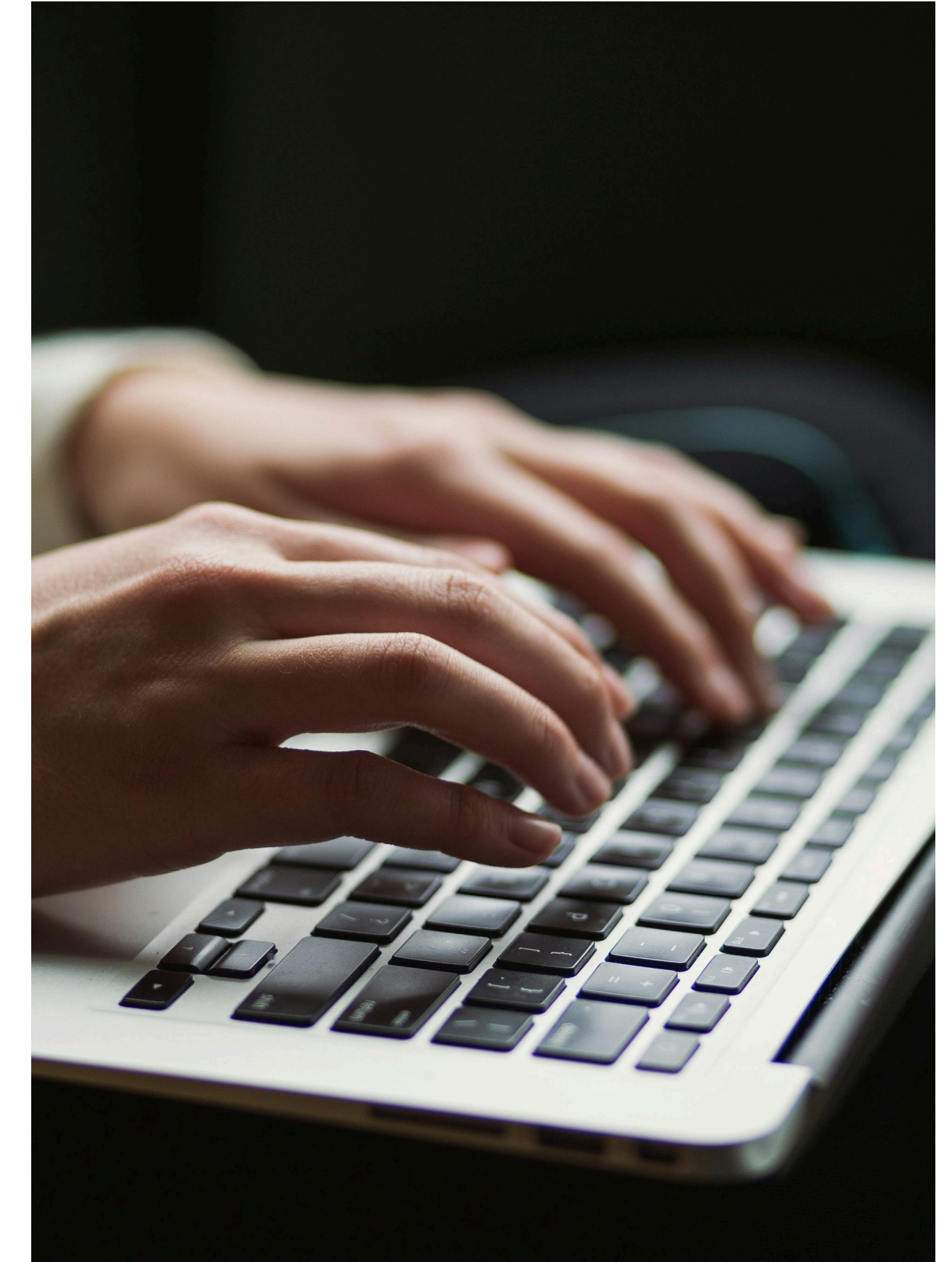
These developments are useful signals, but they should not be interpreted as an immediate or universal roadmap. The relevance and timing of in-chat purchasing will vary by category, price point and consumer behaviour. For many companies, the most important near-term step is therefore not full technical integration, but developing a clear understanding of where conversational AI already influences customer decision-making, and where it may do so next.

Observing user behaviour, testing visibility in AI-driven discovery and building internal knowledge of emerging commerce models are meaningful forms of progress while standards are still forming.

“A look into things to come and setting your company up for success in AI mediated purchase journeys”

In Europe, AI-enhanced shopping assistance remains more limited. Localisation and regulatory requirements slow rollouts, and the experience differs across markets, particularly between the EU and the UK.

That said, past rollout patterns and clear signals of consumer demand suggest that EU markets are unlikely to be left behind indefinitely. For companies operating across multiple regions, this interim period may require market-specific playbooks, while keeping a close watch on developments in the US.



Paid visibility will change the dynamics, but not the fundamentals

A second major development on the horizon is the introduction of advertising in ChatGPT. This marks a shift from today's entirely organic visibility model toward a hybrid one. While many execution details remain unknown, the central question is not pricing or format, but trust. Conversational AI relies on user confidence in the quality and neutrality of answers. If advertising undermines that trust, the long-term value of the channel is at risk.

So far, AI visibility has been shaped by content quality, topical authority, structured data and trust signals on third-party platforms. This has allowed challenger brands to compete effectively without relying on large budgets, but it has also come with limited transparency and difficult attribution. Advertising will change this balance. Given the high intent and conversion rates seen in AI-driven traffic today, demand for paid placements is likely to be strong and prices high.



At the same time, many consumer companies already over-invest in lower-funnel activation and under-invest in brand building. Even as paid AI visibility emerges, we expect a familiar pattern to reappear: a mix of organic and paid presence, where fundamentals such as strong brands, positive reviews and genuine customer advocacy continue to play a central role.

Poorly executed advertising risks eroding trust quickly, while companies that consistently deliver strong customer experiences are more likely to benefit regardless of channel mechanics.

OpenAI are conscious of the delicate balance, and have communicated that advertisements will not interfere with the quality of recommendations. While early indications point to a Cost-per-Mille (views) based pricing rather than Cost-per-Click (action), specific are moving and can change from time of writing.

Across all scenarios, one conclusion remains consistent. While tools, formats and channels evolve, the principles that drive visibility today will continue to matter. Products and services that customers genuinely value, trust and recommend are more likely to be surfaced by AI systems, whether visibility is earned organically or supported by paid placements.

Our checklist to get you started on your AI visibility

This checklist is intended as a practical starting point.

1. Understand the part AI plays for your customers

AI will not matter equally across all categories or purchase journeys.

- Identify where your products or services require comparison, explanation or reassurance, as these are the areas where AI influence is most likely to grow.
- Prioritise early or late stages of the purchase journey based on decision complexity and the likelihood of AI influencing the final choice.

2. Establish your baseline

Understand where you stand today relative to your competition.

- Review referral traffic from AI tools where available.
- Run a simple Share of Answer audit on a small set of high-intent customer questions
- Add AI as a response option in self-attribution questions to build directional insight.

3. Invest in fundamentals that AI rewards

AI visibility compounds around the same fundamentals that drive long-term brand strength.

- Deliver products and services customers genuinely love and recommend.
- Build credible content rooted in real expertise and unique insight, not generic output. Focus on evergreen content for upper-funnel visibility and on product pages for lower-funnel relevance.
- Ensure LLMs can interpret your site by adapting rules for crawlers and leveraging structured data where possible on your site.

4. Enable the organisation to learn, not just implement

Treat AI visibility as an ongoing learning curve.

- Assign clear commercial ownership and mandate experimentation.
- Review progress regularly and adapt based on observed outcomes.
- Build internal capability while standards and best practices are still forming, rather than waiting for perfect clarity.

5. Treat AI as an addition to the acquisition toolkit, not a replacement

Conversational AI does not make existing channels obsolete, but it can change how they perform.

- Continue investing in proven channels while layering AI visibility on top, adjust priorities based on evidence and learning rather than hype.
- Be ready to scale what works for your business and category as AI-driven discovery, advertising and in-chat purchasing mature.

Methodology

This online survey was conducted in collaboration with leading provider Norstat using their online panels. A total of 6,488 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 over a short screening questionnaire consistently reported using such tools more than once a month, either personally or professionally, were classified as active users. 3,167 of those qualified 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 December 2025-January 2026.

- Survey type: Online
- Markets: Sweden, Norway, Finland, Denmark, UK, Germany
- Total base (all markets): 6,488
- Completed full survey following qualification: 3,167
- Fieldwork period: December 2025-January 2026

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

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

About

Verdane is a specialist growth buyout investment firm that partners with tech-enabled and sustainable businesses that help to digitalise and decarbonise the European economy. The flexible mandates of Verdane funds allow it to invest as a majority or minority control investor, replacement or growth capital, in single companies or in portfolios of companies.

Verdane has raised €9 billion in capital and its funds have made more than 200 investments in fast-growing businesses since 2003. Verdane's team of over 150 investment professionals and operating experts is based out of Berlin, Copenhagen, London, Helsinki, Munich, Oslo and Stockholm and combines deep sector expertise with long-standing local networks and presence in core European markets.

Verdane is 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.

Verdane is partly owned by the Verdane Foundation, which is focused on two areas: climate change and more equitable and inclusive local communities.