



EXECUTIVE INSIGHTS

AI Is Reshaping Discovery, Influence and Visibility Without Fully Replacing Traditional Shopping Paths

Artificial intelligence (AI) is fundamentally changing the way consumers across categories are discovering and shopping brands. Consumers are increasingly using AI to find products, especially Generation Z and millennials searching for travel, electronics and financial products. Some 30% of consumers have already used AI for product and service recommendations. For a channel that didn't even exist some 36 months ago, that uptake is significant. And not only is that pace of change accelerating; it's expected to continue picking up speed going forward.

But brands and retailers still need to own authentic experiences, staying relevant and inviting to consumers while also showing up where AI agents are doing the searching on their behalf. That means brands need to market not only to the consumer but also to the agents, because it's the agents that are building experiences through which the consumer discovers and buys brands' products.

Agentic AI is becoming shoppers' first destination

Consumers interact with brands via three core AI pathways, whose degree of ownership ranges from limited to full:

- **Generative search for discovery of brands** — Sites such as ChatGPT, Claude and Perplexity enable customers to research, compare and form preferences, shifting discovery and influence upstream of owned channels; brands cannot own the interface or control user behavior, but they can increase visibility and trust through targeted measures.

- **Agentic commerce experience across brands** — Third-party platforms such as Shopify and Etsy orchestrate purchase actions (e.g., basket building, checkout) using brand or retailer integrations, creating new “routed demand” paths; brands can enable data and checkout via these platforms, trading off some ownership for new demand creation.
- **AI experiences developed by brands** — Brand-owned sites and apps deliver innovative services and experiences to guide shoppers through discovery and decision-making, differentiating the customer journey while retaining proprietary data; brands own the experience design, data and measurement but cannot fully control how or where customers enter the funnel.

But while AI’s impact on the consumer journey is real, it’s also nuanced.

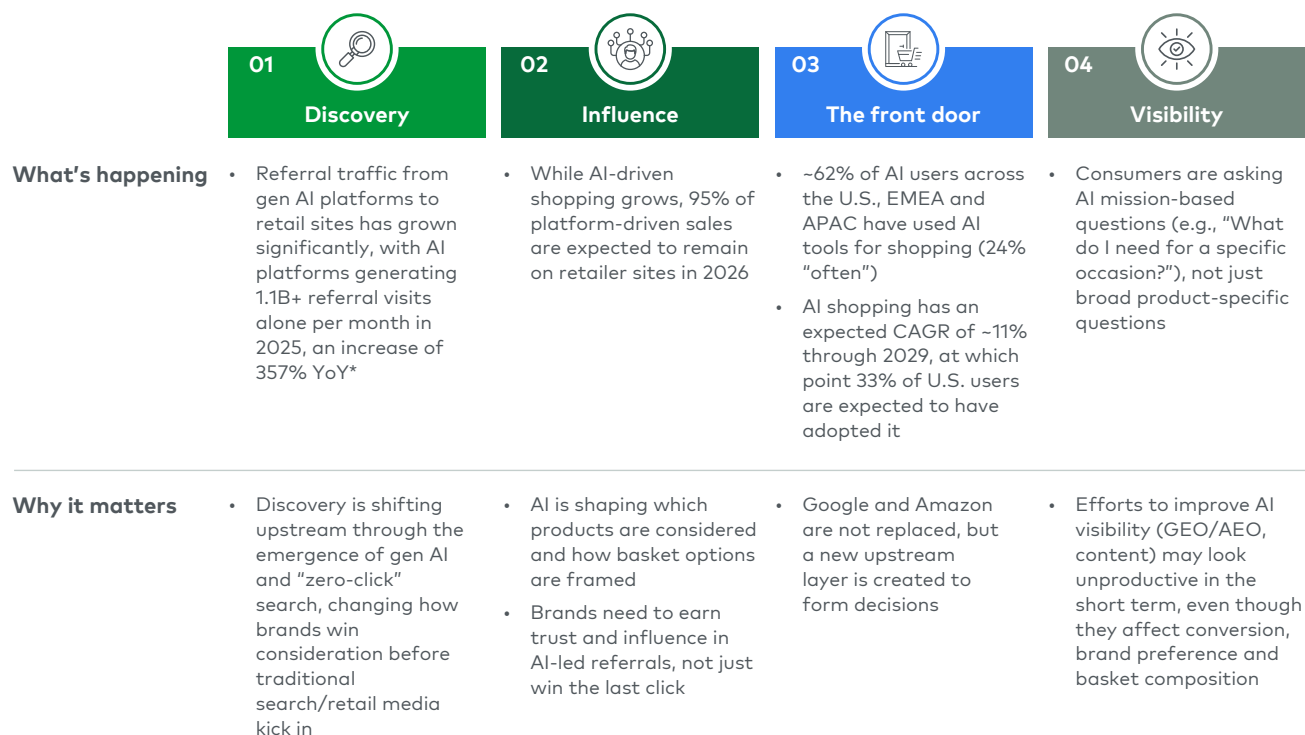
How AI is reshaping — but not replacing — shopping paths

AI is fundamentally reshaping discovery, influence and visibility. But it has not fully replaced traditional shopping paths.

It starts with discovery. AI was responsible for more than 1.1 billion retail site visits a month in 2025, a year-over-year surge of 357%. Yet the story extends well beyond traffic. AI is shaping which products consumers consider and how they frame their basket options. Some 62% of users across the U.S.; Europe, the Middle East and Africa; and Asia-Pacific have already used AI to inform where they go next, making it a genuine front door. And consumers are increasingly framing queries around specific goals rather than broad product questions, making AI visibility efforts far more consequential than they might initially appear (see Figure 1).

Figure 1

Four truths about AI for consumer shopping today



*Based on June 2025 data

Note: AI=artificial intelligence; Gen AI=generative AI; YoY=year over year; EMEA=Europe, the Middle East and Africa; APAC=Asia-Pacific; CAGR=compound annual growth rate; GEO=generative engine optimization; AEO=answer engine optimization
Source: SimilarWeb; eMarketer; Bazaarvoice

What that implies for brands is significant. Discovery is shifting upstream, before traditional search or retail media even kicks in. It's not that Google and Amazon are being replaced, but a new decision-forming layer now sits above them. So brands need to earn trust and influence in AI referrals, not just win the last click.

Consumers are arriving at AI platforms with goal-oriented queries — not "running shoes," for example, but "best trail running shoes for wide feet under \$150." That specificity means AI is filtering and ranking products against criteria that brands may not even know they're being evaluated on. Winning in that environment requires more than a strong product page. It requires structured data, credible third-party signals and content that maps to how real consumers frame their needs, not just how brands describe their products.

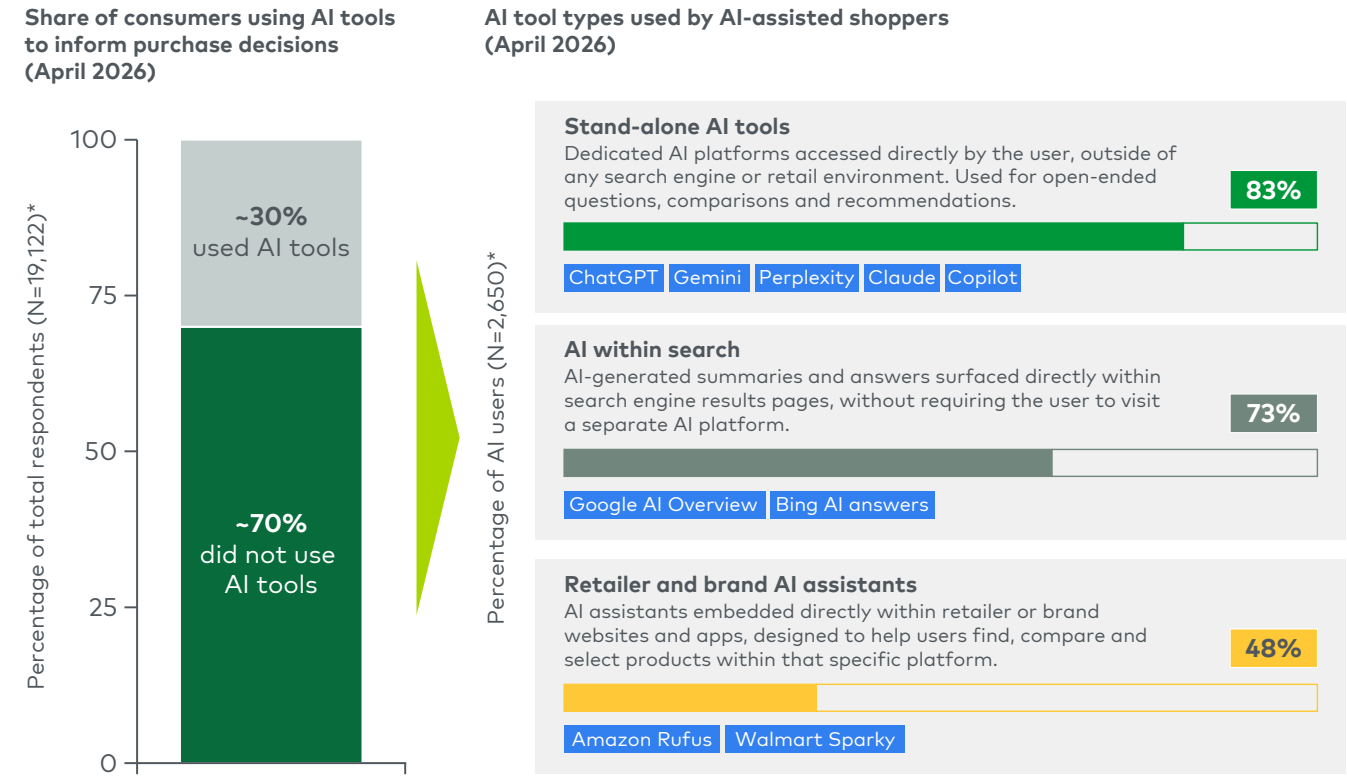
Efforts to improve AI visibility may look unproductive in the short term, but they're already shaping conversion, brand preference and basket composition downstream. Brands that show

up well in AI discovery influence consideration before the consumer ever reaches a retailer, whereas those that don't are losing ground they may not even be measuring yet.

These shifts have started to become visible in online retailers' traffic numbers. In a little over a year, generative search's share of inbound referrals to retail ecommerce sites' product pages had risen to 3.5% (November 2025) from just 0.3% (September 2024), according to Euromonitor International,¹ "with growth showing no signs of slowing anytime soon."

The impact of AI discovery varies by consumer category, with the greatest disruption occurring in comparison and mission-led purchase journeys (e.g., home improvement/parts, electronics and appliances, beauty and wellness). But broadly speaking, AI is beginning to drive meaningful ecommerce sales, with approximately 30% of consumers using AI tools to inform their purchase decisions (see Figure 2).

Figure 2
AI tool usage in consumer purchase decisions



*Survey questions: Q7. Thinking about purchases you have made in the past three months, which of the following have you used at any point to help you research, compare or decide what to buy?; Q9. You indicated that you used AI-powered tools and assistants in your purchase decision. Which of the following types of AI tools did you use?
Note: AI=artificial intelligence
Source: L.E.K. survey and analysis

And its impact is forecast to accelerate as adoption increases. How much value AI drives depends heavily on how aggressively retailers adopt it; early and broad adoption creates incremental growth and leads to much higher impact. But retailers that move slowly on AI as their competitors use it to capture more demand risk missing out on incremental growth.

While AI-assisted shopping is still becoming mainstream, the consumers leading that shift today are disproportionately younger cohorts that will account for a growing share of purchasing power over the next decade.

Generative search as gatekeeper

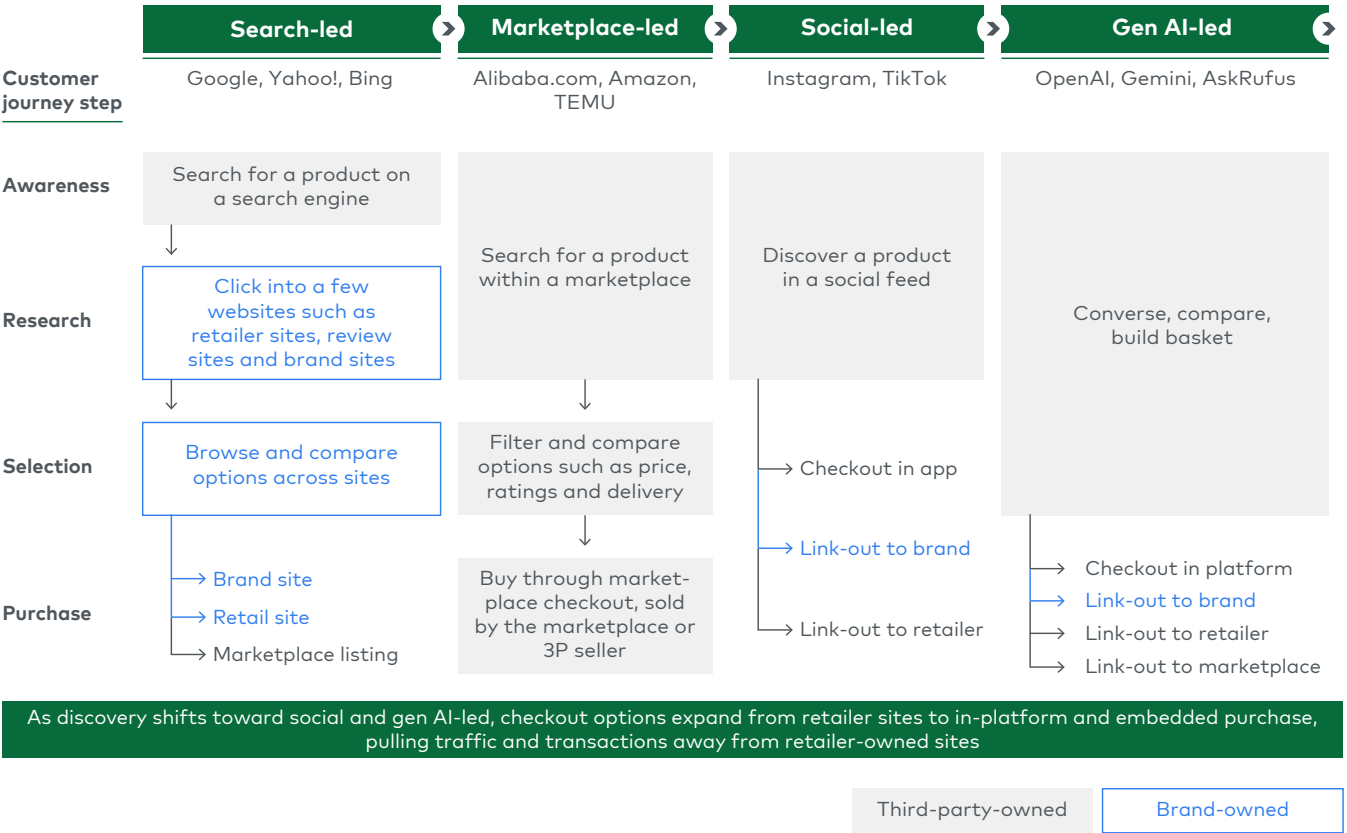
By influencing what shoppers see and choose, generative search has the potential to redirect media dollars, which has real implications for brands' and retailers' customer acquisition costs.

It's already creating a fundamental shift in ecommerce. As generative search inserts itself between consumer intent and purchase, brands and retailers are losing their grip on discovery, checkout and fulfillment. Generative search collapses the funnel by turning a need into an answer and a short list in chat, reducing clicks, site visits and comparison across sites. Recommendations become the new "ranked shelf," with generative search choosing which products and sellers are surfaced based on signals and context. Checkout becomes flexible, occurring on platform or via link-out, changing who owns the conversion moment.

That shift impacts customer acquisition costs. Generative search checkout creates new "tolls" on transactions, reshaping who owns the customer relationship. Customer ownership weakens as intent, identity and performance data concentrate in generative search, limiting first-party data, pricing leverage and loyalty attachment. Control shifts upstream as generative search influences what gets chosen, where checkout occurs and who fulfills, forcing a trade-off between reach and autonomy.

Customer journeys are already starting to consolidate from many steps into one generative search-led flow, creating a new primary front door and shifting power across the value chain (see Figure 3).

Figure 3
Evolution of the customer journey



Note: AI=artificial intelligence; Gen AI=generative AI; 3P=third-party
Source: L.E.K. research and analysis

Today the vast majority of consumers arriving at brand and retailer sites are still coming through traditional channels rather than AI, with AI referrals still under 0.5% of total inbound traffic in absolute terms. This rate of consolidation change is noteworthy, representing a 176% compound annual growth rate between March 2024 and March 2026.

The human touch remains irreplaceable

But while AI can scale discovery and efficiency, it cannot replicate lived experience. Brands that outsource authenticity to AI risk losing the consumer connection that makes marketing resonate. The strategic imperative is to leverage AI for reach and scale while preserving the personalized human experiences that drive genuine brand preference.

Crucially, while AI is changing how consumers discover and decide what to buy, common narratives overstate its impact on how consumers make purchases, who fulfills them or how that value is captured. Even among consumers who are using AI in their purchase journey,

most are still doing a lot of cross-checking via search, reviews and retailer sites before completing a purchase. This indicates a shift in how discovery and comparison happen rather than the end-to-end process.

This has resulted in three core myths:

Myth No. 1: Ecommerce is fully agentic

Current reality: Ecommerce is not often agentic, but it's starting to happen

Despite the headlines, end-to-end autonomous shopping ("Do it all for me.") remains nascent, as evidenced by new research from L.E.K. Consulting discovering that just 8% of AI users completed a purchase entirely through an AI agent without visiting a brand or retailer site. Indeed, as past experiments such as social platform checkout and Google Buy buttons have made clear, technology does not drive behavior change in and of itself.

Myth No. 2: AI is replacing retailers and brand ecosystems

Current reality: AI does change what consumers use your site to do

AI tools lack the real-time inventory, returns data and incentives required to operate as true retailers. But retailers that take too much comfort in that fact risk missing the real threat: AI is already changing what consumers expect when they arrive, and those that aren't adapting risk becoming transaction processors rather than destination brands.

Myth No. 3: AI will kill ads

Current reality: AI will change your marketing mix

AI will, to be sure, reshape formats and surfaces, with spend expected to increase approximately 10% year over year as AI agent capabilities scale. Expect AI to become a new ad pillar but not a clean substitute for Google, Meta or retail media.

Don't overhaul; optimize and refine instead

Brands cannot control user engagement with public agents, but they can boost visibility and generate additional inbound traffic by optimizing certain content types. They're only limited by degree of control, which ranges from complete (i.e., brand-owned) to none (i.e., AI platform behavior).

Retailers and brands also need to refine their strategies. While most AI platform-driven sales are likely to remain on brand websites in the near term, agentic commerce is expanding rapidly in both capability and adoption, demanding that retailers and brands get ahead of the shift. Indeed, both retailers and brands risk becoming fulfillment endpoints rather than relationship owners unless they actively invest in brand differentiation, data integration and AI-optimized visibility — all the way from the discovery and awareness and curation and recommendation stages through to buying and executing and, finally, managing the full purchase funnel.

To win in this environment, they should adopt a hybrid strategy of partnering to influence generative search short lists. Moreover, they should access (as well as secure) new checkout paths while building authentic owned experiences that not only protect both margin and customer data but — most important — also maintain and even strengthen their connection with customers.

But brands should also consider what this means for loyalty. In an agentic world, even routine purchases are vulnerable to reshopping every time an agent goes looking. Brands that built their growth model around the returning customer may need to rethink that assumption.

Not if but when — and how

AI is fundamentally changing how consumers discover and shop brands. The shift is already underway, and the window to act is narrowing. For chief marketing officers and CEOs (and investors), the question is no longer whether to engage with this shift but how quickly and how strategically. Brands and retailers that optimize their content for AI visibility, engage with agentic platforms and protect their owned experiences will lead the next era of consumer engagement.

The stakes are highest for brands built around habitual, routine purchasing. When AI collapses the effort of reshopping, making it as easy to reconsider a category as to reorder on autopilot, loyalty that was never really earned becomes visible. Every trip is contestable.

Brands that have invested in genuine differentiation, not just convenience or default positioning, will hold up better in that environment. Those that haven't risk becoming mere fulfillment endpoints selected by agents on price alone.

For a more detailed look at how AI is impacting the consumer decision-making process, don't miss "Thanks to AI, Consumers Are Arriving at Brand and Retailer Sites Ready to Buy."

Endnote:

¹Euromonitor.com, "Generative AI is Revolutionising the Digital Shopper Journey." <https://www.euromonitor.com/article/generative-ai-is-revolutionising-the-digital-shopper-journey>

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