Beyond Search: How AI is Reshaping Discovery and Commerce

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Euromonitor International

ECR AUSTRIA EFFICIENT CONSUMER RESPONSE

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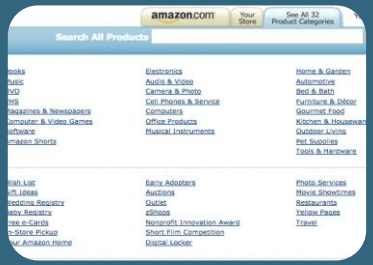
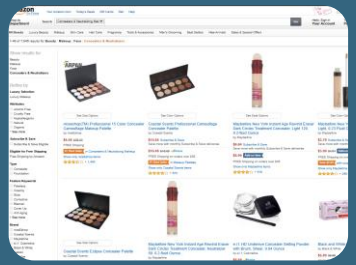
For decades, shoppers have done the work of searching, comparing and choosing

Discovery



Key word search



Browse results

Consideration



Product page and reviews

Conversion



Add-to-cart and checkout

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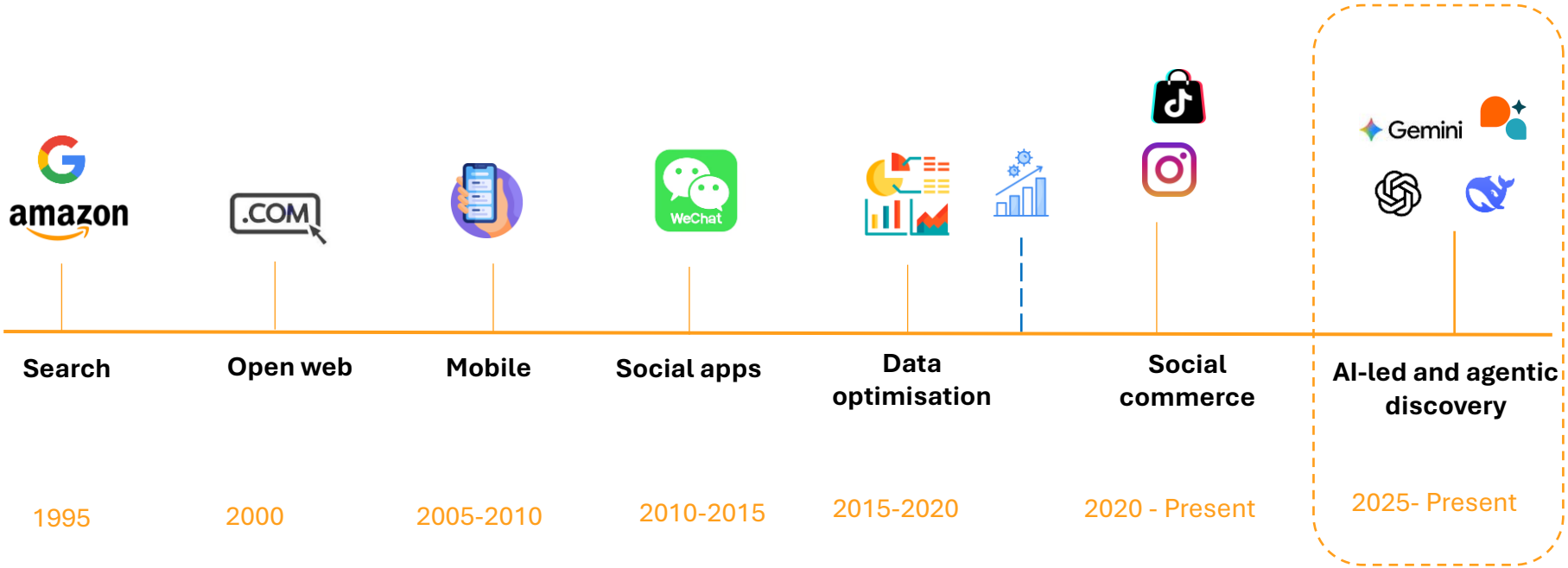
Consumer facing GenAI platforms mark a new era in discovery

Stands to completely redefine the traditional online search-discovery process



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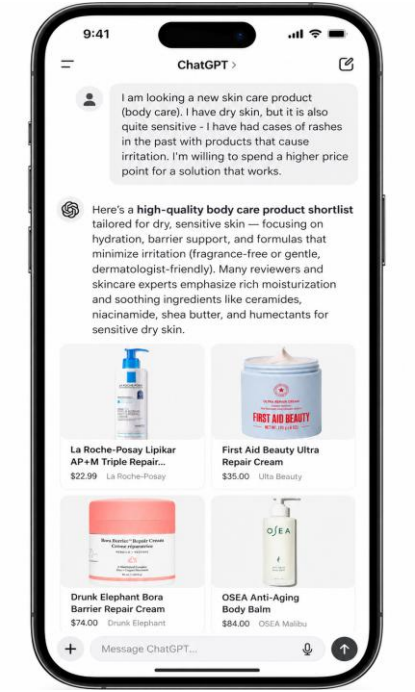
Conversational AI is changing how shoppers discover and evaluate products



28% **Use it to find more relevant product recommendations**

25% **Compare products and brands**

25% **Get detail ingredient, feature or spec information**

Source: Euromonitor International, Voice of the Consumer, Digital Survey 2026

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AI referral traffic is growing rapidly, even as its share of e-commerce traffic remains small

+468%

Gen AI referral growth (Jan 2025-Aug 2026)

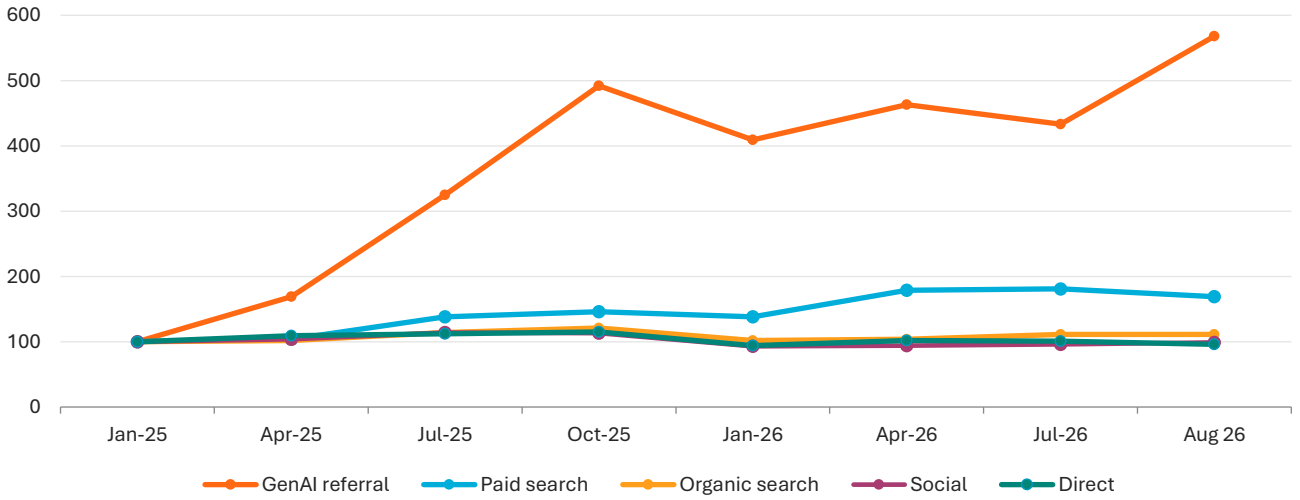
+10%

Growth across all other referral sources combined

1.5%

GenAI share of external traffic, up from 0.3% in Jan 2025

E-commerce referrals by source, indexed (Jan 2025 = 100)



77%

of Digital Consumers who use GenAI

67%

of Digital Consumers who use GenAI for shopping

Source: Euromonitor International

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Early disruption signals in consumer goods



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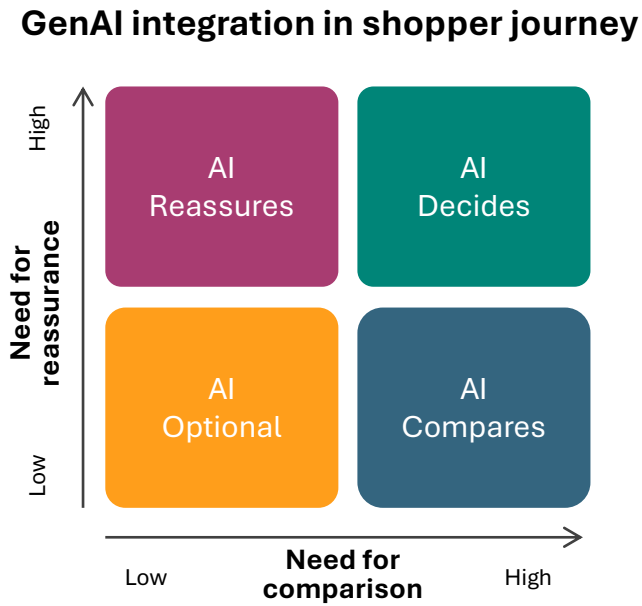
AI's role in product discovery depends on two shopper needs: **comparison** and **reassurance**



Source: Euromonitor International

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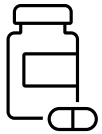
Therefore, category-level exposure is uneven

Share of overall FMCG GenAI referral traffic



47%

Beauty and Personal Care



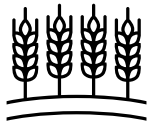
28%

Consumer Health



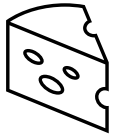
4%

Snacks



3%

Staples



2%

Dairy



2%

Soft Drinks

AI-led discovery is concentrated in categories where shoppers need comparison and reassurance

Source: Euromonitor International,

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Commercial leadership does not guarantee visibility in AI discovery

AI visibility is reshaping the **competitive hierarchy of brands**

E-commerce rank	Brand	AI visibility rank	AI discovery position
1	L'Oréal Paris	8	Ecom +7
2	Estée Lauder	33	Ecom +31
3	La Roche-Posay	3	Aligned
4	**CeraVe**	**1**	AI +3
5	Lancôme	50	Ecom +45
6	Olay	28	Ecom +22
7	**La Mer**	**316**	Ecom +309
8	**SK-II**	**309**	Ecom +301
9	SkinCeuticals	105	Ecom +96
10	Kiehl's	31	Ecom +21
11	Cetaphil	7	AI +4
12	Clarins	53	Ecom +41
13	**Helena Rubinstein**	**1531**	Ecom +1518
14	Clinique	19	Ecom +5
15	Shiseido	44	Ecom +29

AI + means a better AI rank than e-commerce rank; Ecom + means a better e-commerce rank.

Source: Euromonitor International

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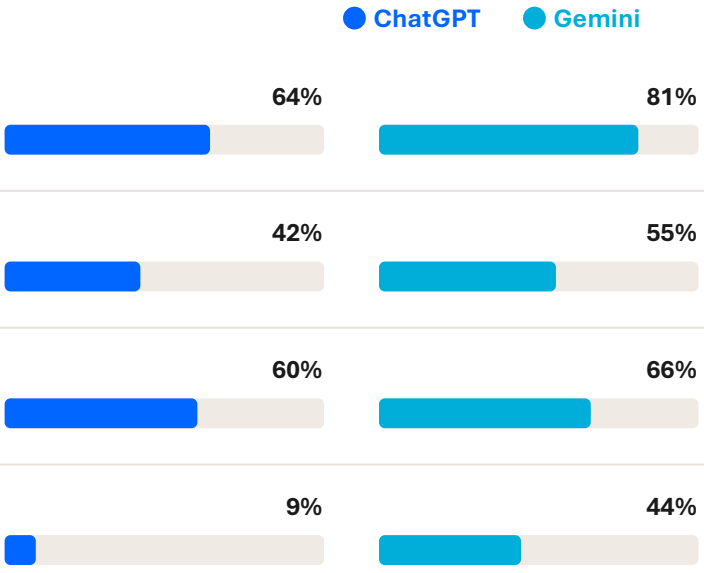
78%

of GenAI shoppers have discovered a brand they had not previously considered

Source: Euromonitor International

AI favors brands it can interpret, explain and corroborate

Share of AI answers about the brand's hero serum containing each signal



Source: Euromonitor International

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CeraVe shows what algorithmic authority looks like in practice



3 Clinical Authority

2 Mechanism

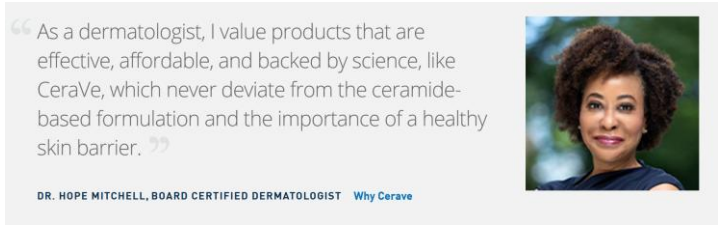
1 Named Active

4%

Share of CeraVe in skin care AI referrals globally in 2025

1st

Rank of CeraVe among skin care AI referrals in 2025



Source: Top, Euromonitor International, E-Commerce, Bottom: CeraVearabia.com

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Even in habitual categories,

specific needs can drive AI discovery



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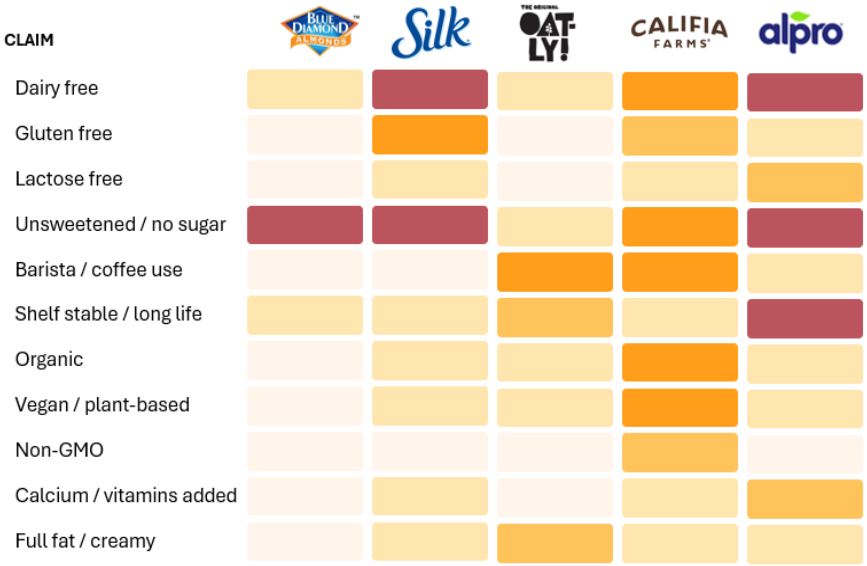
Brands compete on different claim territories – Plant based milk

Share of brand products carrying each claim.



*Darker cells represent higher claim incidence.

CALIFIA FARMS®

Organic 34% . Non-GMO 24%

AI RANK 2025 20th

AI RANK 2026 3rd

BLUE DIAMOND™ ALMONDS

Unsweetened/no Sugar 61%

AI RANK 2025 6th

AI RANK 2026 0

Source: Euromonitor International, E-Commerce and AI referral data based on 10 markets (US, South Korea, UK, Australia, Canada, Japan, India, Mexico, Germany, Brazil)

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Yoga Bar's stronger protein claim presence coincides with a rise to #1 in AI discovery, despite ranking #12 in sales.

Nature Valley vs Yoga Bar 2025–2026



Sales rank
1 → 1
AI rank
1 → 3



Sales rank
26 → 12
AI rank
5 → 1

CLAIM	ADDRESSING		
Protein	Body and performance	25% (−3)	83% (+34)
Protein grams stated	Body and performance	2% (+1)	54% (+40)
Breakfast occasion	Use and convenience	0% —	6% (−7)
Probiotics	Added nutrition	0% —	12% (0)

Source: Euromonitor International, E-Commerce and AI referral data based on 10 markets (US, South Korea, UK, Australia, Canada, Japan, India, Mexico, Germany, Brazil)

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From recommending to acting



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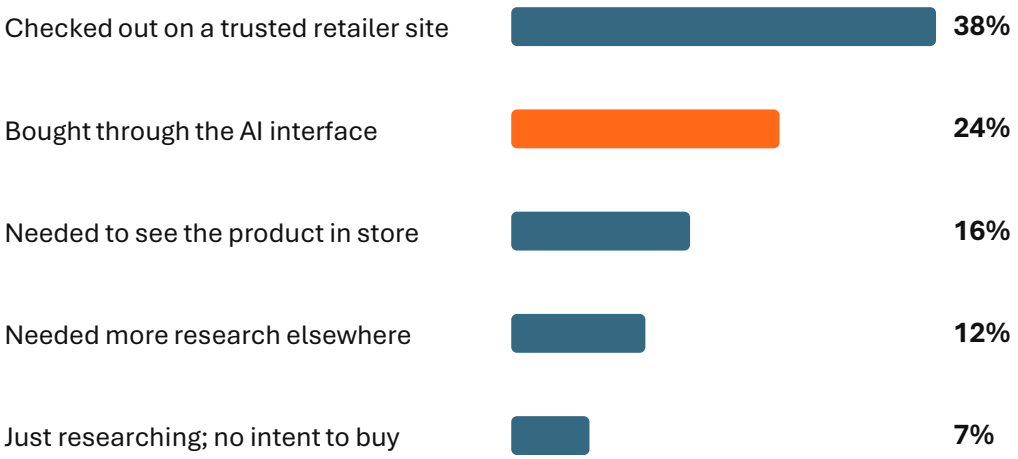
Consumers are using AI to shop, but delegating purchases is a different threshold

Final action after using GenAI to research a product



76%

Step outside the ai tool to complete or validate the product or purchase

28%

Very or extremely comfortable with companies auto-reordering on their behalf

32%

Not at all comfortable with auto-reordering

Source: Euromonitor International, Voice of the Consumer, Digital Survey 2026

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Agentic commerce could separate **discovery**, **transaction** and **fulfilment**

Recommend

“Which running shoes should I buy?”

AI shortlists; the shopper completes the order.

Execute

“Find shoes under £120 and order them.”

An authorised agent compares sellers and purchases.

The commerce journey can be distributed across three functions

INTELLIGENCE

- Interpret intent
- compare products
- shape the shortlist

TRANSACTION

- Authorize
- pay
- complete checkout

FULFILMENT

- Stock
- deliver
- handle returns

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The next competitive advantage: discoverable, explainable and actionable

01

Discoverable

Enter the AI-generated consideration set

02

Explainable

Make benefits, attributes and evidence clear

03

Actionable

Enable reliable product data and agent-assisted purchasing

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Thank you



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