



Prompt to Purchase: How AI is Rewriting the Consumer Journey

May 2026

Agenda

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AI Landscape Overview

Snapshot of Gen AI usage & journey to open web

02

Retail - Grocery

03

Travel

04

Fashion

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Beauty

06

Tech

Snapshot of LLM
share of conversation
& topic modelling

How AI is rewriting the rules of brand discovery, consumer consideration, and purchase intent across UK sectors in 2026.

The AI Visibility Gap is Widening



Traditional search leaders are losing ground in LLM environments proving that ecosystem integration now trumps search authority.

LLMs are opinionated advisors that drive real-world action

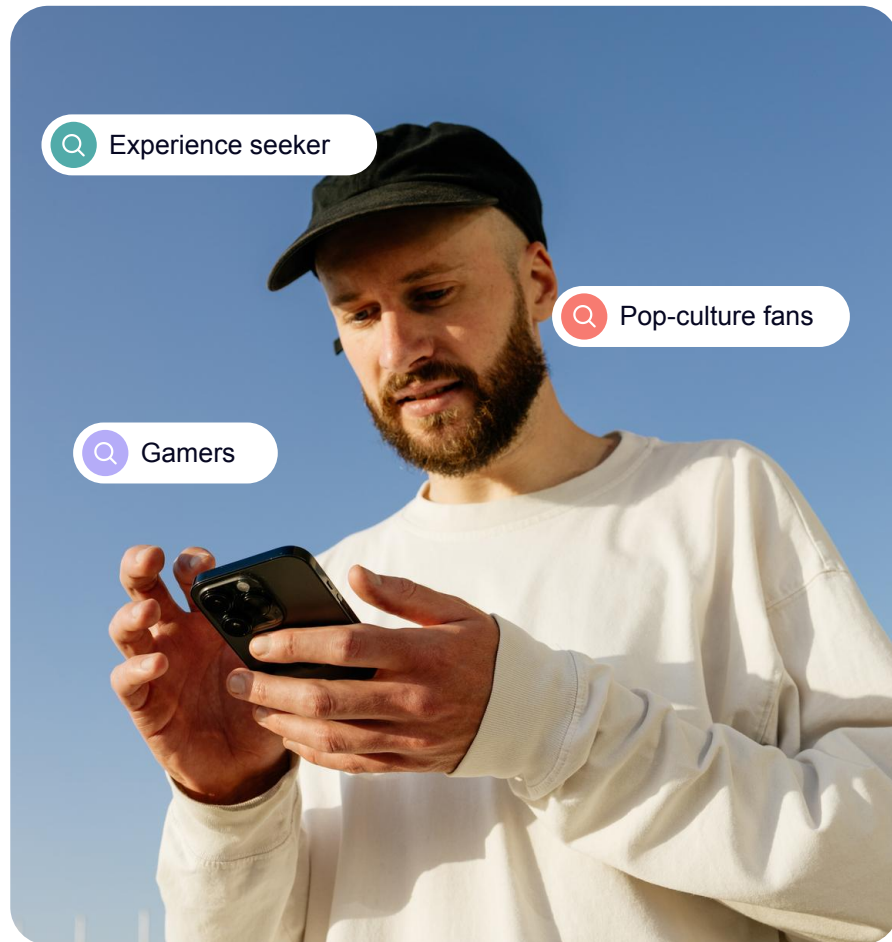


First-position mentions in LLM responses don't just build awareness, they move consumers into active consideration on the open web.

A new optimisation imperative has emerged



Brand performance varies by up to 27 percentage points across ChatGPT, Gemini, Claude, and Perplexity, making multi-model visibility, sentiment, and endorsement a measurable driver of purchase intent that brands can no longer afford to ignore.



Executive Summary

LLM Conversations Span High-Level Discovery to Deep-Dive Decision Making

While LLM use is currently focused on functional efficiency (research and tasks), a major shift is emerging: users are leveraging AI as a strategic guide for brand navigation and complex decision-making.

The Solution Sweet Spot: Conversion to Open Web Peaks at 5-6 Prompts and Within the First 48 hours

User engagement shows a barbell pattern, shifting between quick fact-checks and deep research. The 5-6 prompt 'sweet spot' resolves complex needs demonstrating the conversion gap from LLM to open web.

LLMs are Opinionated Advisors, Rarely Sitting on the Fence

Across sectors, LLMs act as opinionated advisors by positioning a single brand as the primary recommendation in approximately 70% of interactions.

AI's Potential to Positively Influence Brand Perception

LLMs' optimism bias boosts brand positivity by up to 60 percentage points and nearly eliminates negative sentiment, creating a high-value endorsement that drives open web conversions.

LLMs Curate Intent: Recommendation Directly Triggers a Search Surge

Because consumers treat LLM responses as expert consultations, branded mentions within these sessions lead to higher consideration scores and more meaningful engagement on the open web.

Not Just Discovery: AI Supports Consumers Across the Purchase Path

AI-led brand discovery is a non-linear process. Users either begin with unbranded LLM research to define categories before moving to the web, or start on the open web for initial exploration and transition to LLMs for final curation and deep analysis.

A Quick Changing Landscape:

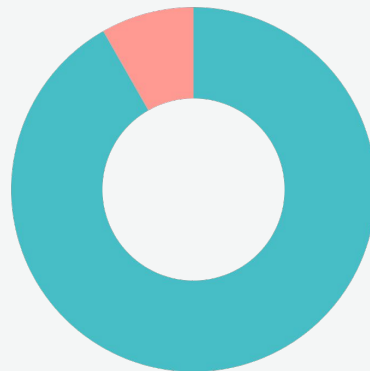
Google's Integration vs OpenAI's Edge

Despite intensifying competition, OpenAI maintains a commanding **62%** share of prompts among the top two major players, leveraging its early entry into the market to cement ChatGPT as the primary destination for LLM browser usage.

By weaving AI into its legacy digital suite, Google (exc overview) has successfully converted its vast user base into GenAI adoption, surging to a **37%** share in Q1 2026.

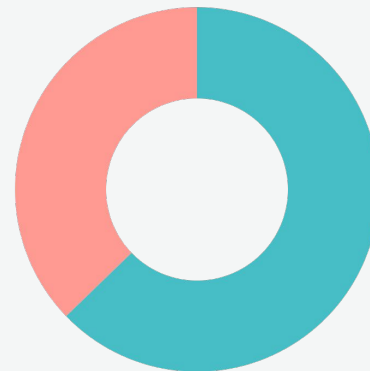
Google's rapid growth, which has been gained at the expense of OpenAI's original 90% usage peak, demonstrates that integrated platform ecosystems are effectively challenging standalone AI tools in the UK market.

JULY 2025



● 89% OpenAI
● 11% Google

Q1 2026



● 62% OpenAI
● 38% Google

LLM Conversations Span from High-Level Discovery to Deep-Dive Decisions

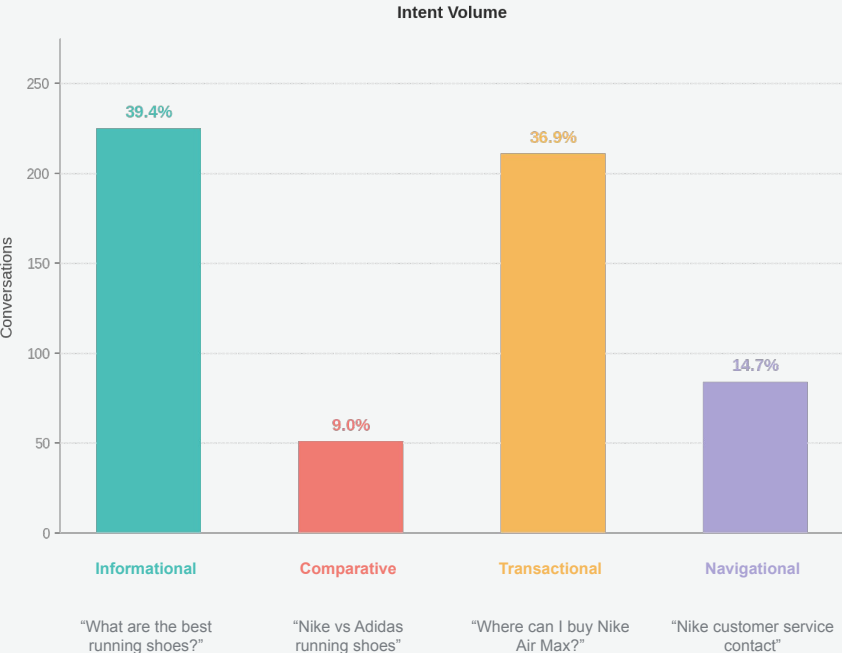
The majority of LLM engagement is functional, with informational (39%) and transactional (37%) prompts accounting for over three-quarters of all usage as users seek direct answers and efficiency.

Predominantly, consumers are using AI to learn, research and help with complex problem solving. Following this, consumers want agents to help with task-based executions.

With 15% of prompts being navigational and 9% comparative, consumers are increasingly treating AI as a guide and decision-making companion to cut through online noise and evaluate brand options.Overall, this shows how the funnel itself is changing with holistic intent growing in importance.

Prompt Intent Classification: Understanding Consumer AI Usage

Sportswear Example

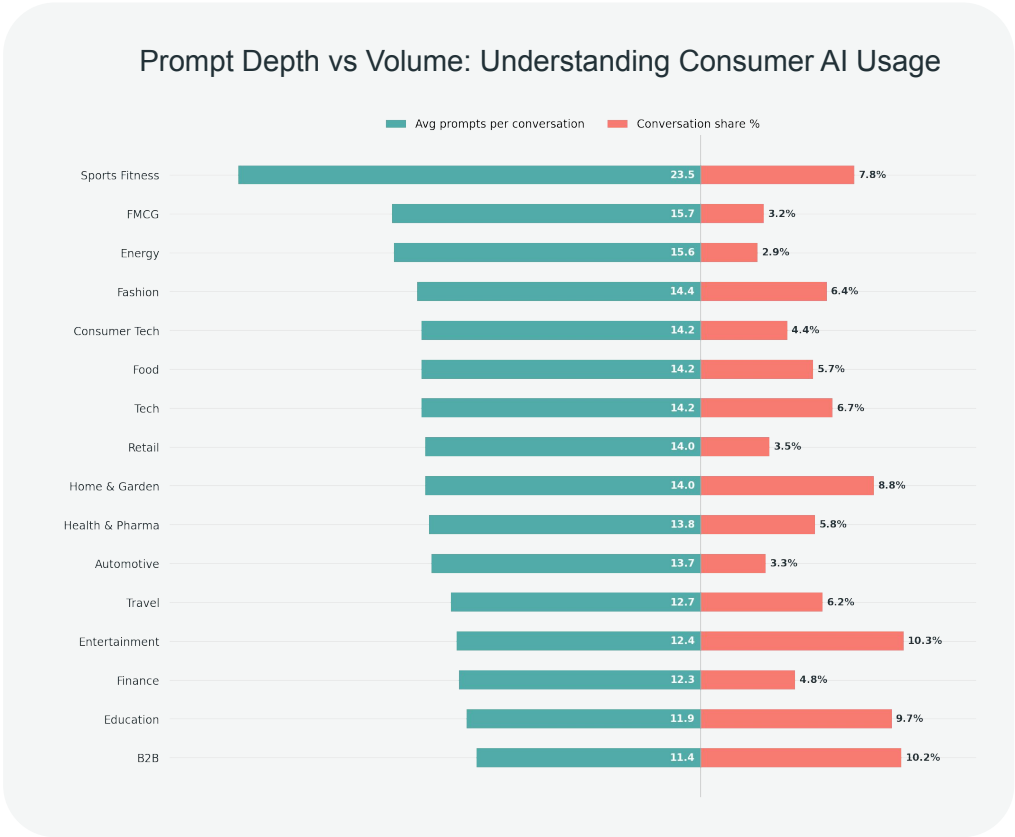


LLM Engagement is Driven by Discovery, Problem Solving & Personal Improvement

The Sports Fitness industry drives the highest conversation volume, averaging **23.5** prompts per session, as users leverage AI for hyper-personalised coaching and training adjustments.

Entertainment, B2B, and Education command the largest conversation share at **~10%** each, reflecting a fundamental shift toward AI-assisted content discovery and structured professional workflows.

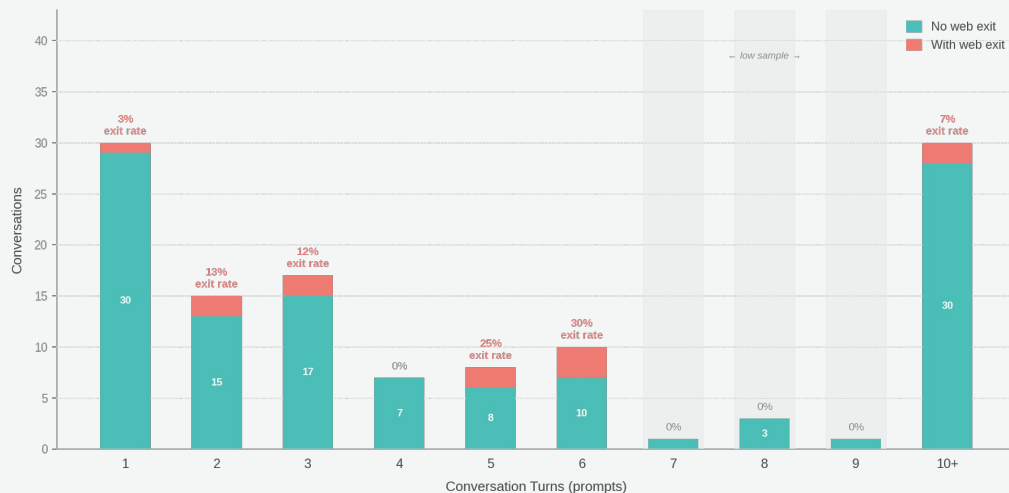
Personal and professional development are key drivers, with consumers increasingly utilising LLMs for high-stakes tasks such as interview preparation, custom learning plans, and technical coding support.



The Solution Sweet Spot: Conversion Peaks at 5-6 Prompts

Conversation Depth vs Open Web Exit Rate (14 day window)

Sportswear Example



UK data reveals a barbell engagement pattern where prompts are either single-turn (such as quick fact-checks) or 10+ turns (deep research), leaving the mid-length conversation as the primary engine for external traffic.

Roughly 3 in 4 conversations are brief (<7), yet 1 in 4 reach 10+ turns — suggesting a meaningful segment of users are engaging in genuinely complex, multi-prompt sessions.

User engagement typically peaks and concludes within a 5-6 prompt cycle, marking the sweet spot where a consumer's requirement meets a solution and triggers transition to the open web.

FROM INSIGHT TO ACTION

Brands must understand those mid length conversations, tap and address consumer needs in open web to capture and convert open web exit traffic.

One Week to Win: Early Conversion Dominates in Every Sector

Across all sectors, the vast majority of intent is captured early; **75-85%** of total conversions that translate to the open web occur within the first 14 days of the initial prompt.

Straightforward high-intent triggers within a sector, for example mobile in Tech and accommodation in Travel, see over **50%** of users transitioning from LLM to the open web within just 48 hours.

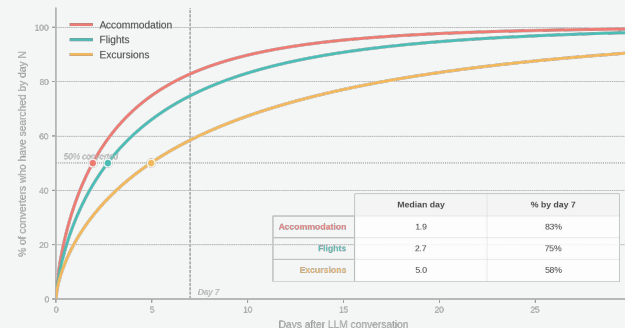
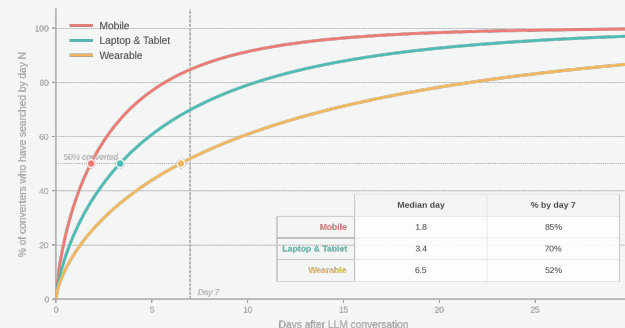
In contrast, more complex categories seem to require longer research, with subcategories like wearables and excursions driving deeper, multi-day deliberation before exiting the AI environment.

FROM INSIGHT TO ACTION

Brands must capitalize on the purchase intent from AI interactions. For complex products, sustained visibility within LLMs across multi-day research is crucial to capture long-tail conversions before consumers switch to competitors.

The Path from Prompt to Open Web

Time between a user's last LLM interaction on a topic and their first related open web search



Model Variance: Not One Size Fits All

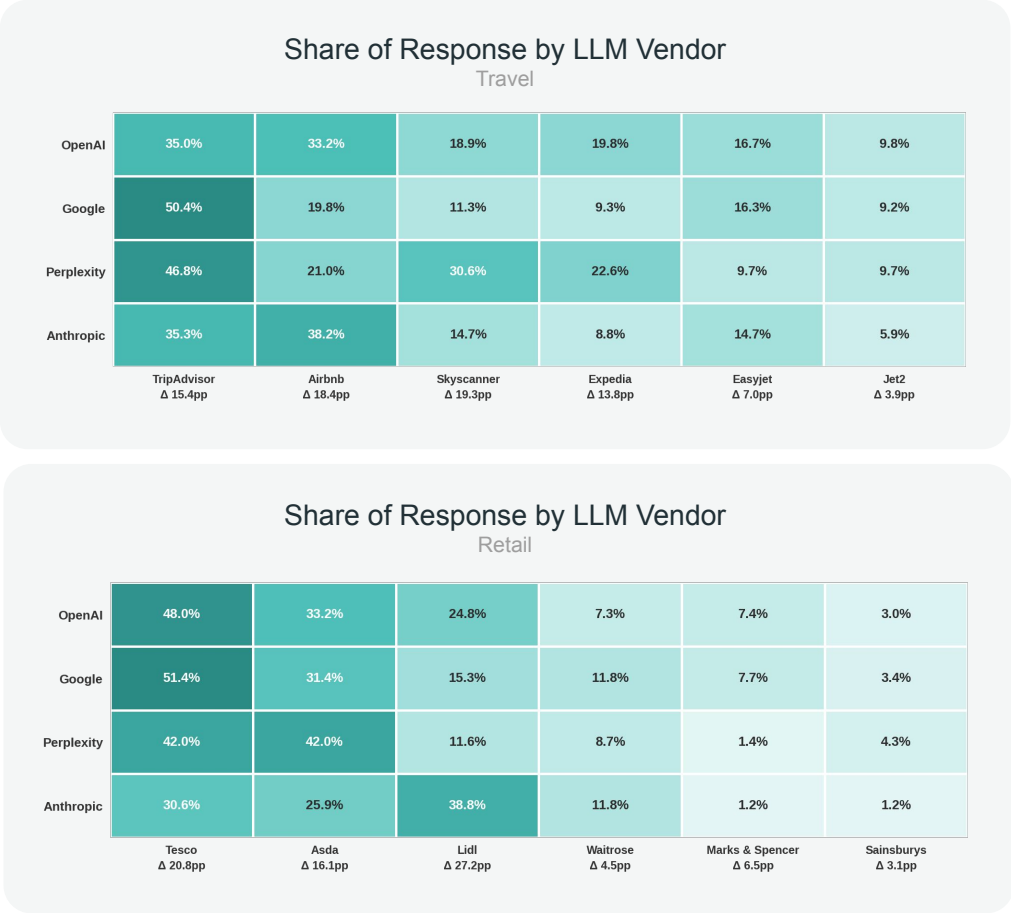
Winning in the AI era requires a tailored strategy for each LLM vendor; as brands experience varying recommendations and citation logic of ChatGPT, Claude, and Gemini simultaneously.

Across sectors, the gap between a brand's best and worst visibility across models is enormous; for example, Lidl spans a 27 p.p. gap, thriving on Anthropic (**38.8%**) while remaining nearly invisible on Perplexity (**11.6%**).

Reporting an average share of response is increasingly misleading, as leaders like Tesco (21 p.p. span) and Skyscanner (19 p.p. span) see their influence fluctuate wildly depending on the specific LLM vendor.

FROM INSIGHT TO ACTION

The brands in the strongest position are those achieving consistent, above-average representation across all four vendors. Brands must consider a holistic approach and ensure multi-model optimisation for consistency and prioritise genuine brand authority.



LLMs are Opinionated Advisors, Rarely Sitting on the Fence

Across all sectors, LLMs frame brands as the singular, primary recommendation **65–72%** of the time, proving that AI models behave as opinionated advisors rather than neutral tools. Brands are either explicitly endorsed or referenced without clear recommendation (~**25%**) in the AI-driven path to purchase.

Travel brands see the strongest framing, with **72%** of mentions being primary recommendations, with the nature of the sector compelling the AI to provide clear expert guidance.

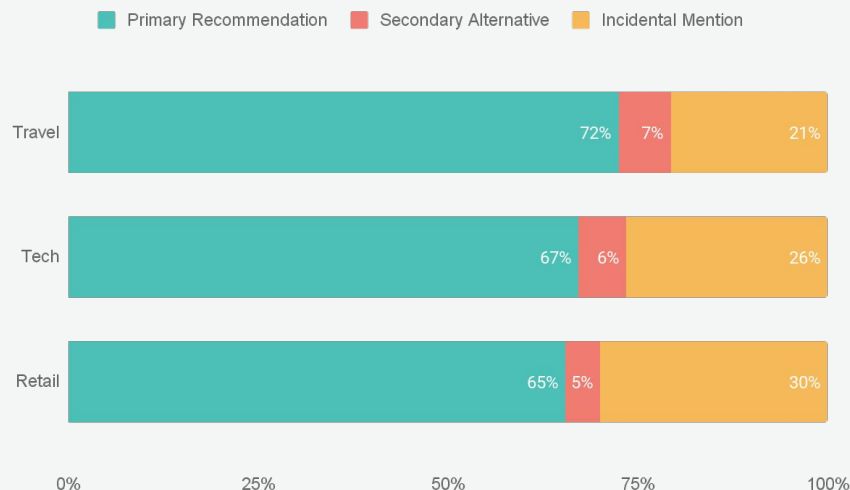
Retail has the weakest framing quality, with **30%** of brand mentions being incidental, meaning retail brands frequently appear as background noise rather than a single endorsed choice.

FROM INSIGHT TO ACTION

Brands should track not just how often they appear in LLM responses, but in what framing. A brand with fewer total mentions but 80% primary recommendation framing is in a fundamentally stronger position than one with twice the mentions but 40% incidental.

Response Recommendation

Primary recommendation = top/only recommendation, Secondary alternative = one of several equally weighted choices, Incidental mention = referenced without clear recommendation



Win the Comparison, Not Just the Mention

Looking at the travel sector, Airbnb dominates the solo spotlight, where the LLM is mentioned as the exclusive solution for specific user requirements.

In contrast, in comparison-style prompts, Expedia holds a +12 p.p. advantage, consistently securing the first-mention position when the AI evaluates competitive, multiple travel options.

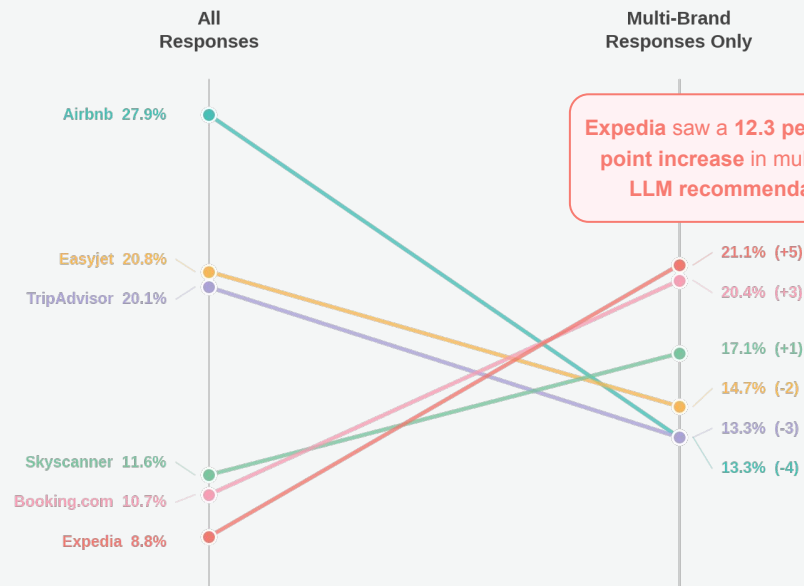
Whilst Airbnb is frequently mentioned in single brand conversations, multi-brand comparisons are where the most valuable earned recommendation is won. Expedia's dominance in comparison lists is highly valuable as the primary beneficiary of LLMs opinionated advisor role in travel markets.

FROM INSIGHT TO ACTION

Brands need to communicate differentiation and a sales USP to convert consumers with broader consideration, making them relevant in not just exclusive recommendations but within multi brand comparisons amongst competitors.

First Mention Advantage - LLM Responses

Travel Sector Example



Expedia saw a 12.3 percentage point increase in multi-brand LLM recommendation

AI's Potential to Positively Influence Brand Perception

LLM responses are consistently 40–60 p.p. more positive than the original user prompts, creating an optimism bias that reframes brand perception during the discovery phase.

Negative sentiment effectively vanishes in AI outputs, plummeting to an average of just **2%**, as models are tuned to provide constructive, solution-oriented advice rather than echoing consumer complaints.

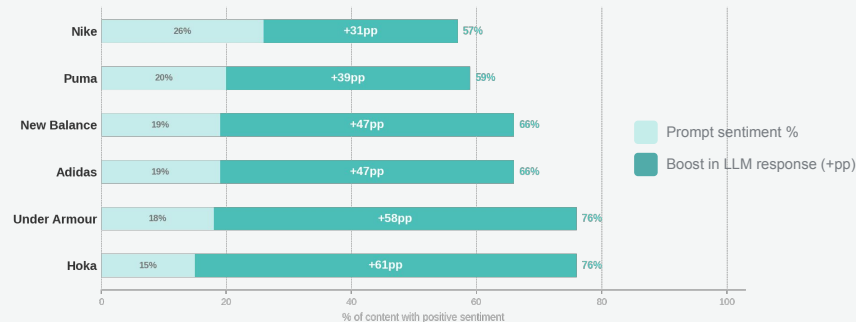
Since AI framing is always overwhelmingly positive, being the first-cited brand—especially in competitive sets—serves as a premium endorsement that directly fuels conversion to the open web.

FROM INSIGHT TO ACTION

Brands must prioritise LLM presence, as AI's built-in optimism bias means every mention is a premium endorsement. First position in a competitive set likely translates directly into real-world conversion.

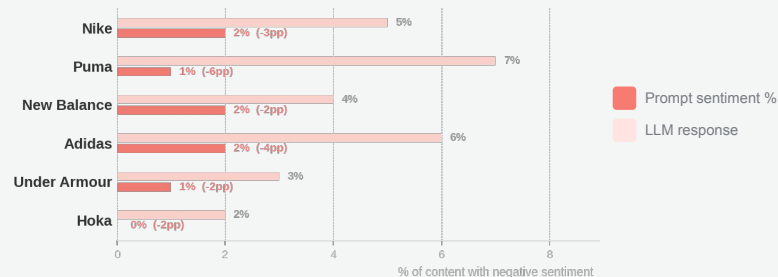
Prompt vs LLM Response: Positive

Sportswear brands (light bars = user prompts, solid bars = LLM response)



Prompt vs LLM Response: Negative

Sportswear brands (light bars = user prompts, solid bars = LLM response)



LLM Conversations Reveal an Interconnected Purchase Path

LLM conversations reveal a clear pattern of brand switching in the consumer purchase process. This helps us understand where consideration begins in the LLM environment and continues on the open web.

Travel conversations demonstrate significant brand movement (averaging 67%) with consumers starting research on comparison sites (Expedia, Skyscanner) via LLM but switching to direct carriers (Easyjet, Jet2) for purchase, driven by reliability, price, and trust.

Travellers frequently switch from premium brands such as British Airways to budget options such as Easyjet or Skyscanner, indicating that consumers use LLMs to weigh prestige against price, often prioritising flight-time flexibility over brand heritage.

The journey between flight and accommodation research is now fluid and non-linear. Users leverage LLMs to simultaneously assess the feasibility of Airbnb versus hotel stays against flight availability, effectively treating the entire holiday as a single integrated ecosystem.

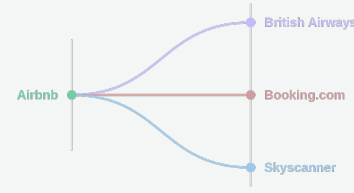
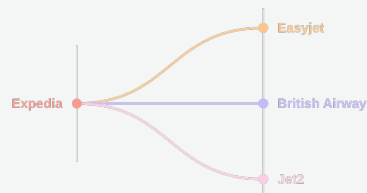
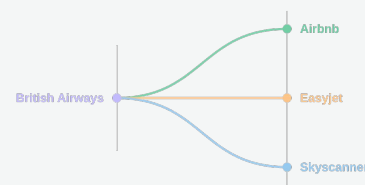
Brand Switching Journey - LLM to Open Web

Travel Sector Example

An average of 66.7% of consumers switched brands

01 LLM First

02 Open Web



Consumer LLM Consideration Journey

01

Unbranded LLM Prompt



Which running shoes are good for long distance training?

02

Branded LLM Response

"Adidas Adizero Evo SL: A lightweight, non-plated version of their elite racers. It's praised for being one of the most versatile and value-packed shoes for 2026."

03

Increased consideration across the open web



Why it Matters: LLMs Curate Intent

LLMs act as a high-intent filter; by providing detailed, branded solutions, they pre-qualify users who then exit to the open web with a clear intent to act rather than just browse.

Across all categories, the vast majority of intent is captured and converted within the first seven days, as users trust and follow through on the specific, opinionated advice provided by the LLM.

Because consumers treat LLM responses as expert consultations, branded mentions within these sessions lead to higher consideration scores and more meaningful engagement on the open web.

FROM INSIGHT TO ACTION

Ensure your brand appears in LLM responses with specific, solution-oriented content — because the users who exit to search after an LLM interaction aren't browsing, they're buying. Being absent from that pre-qualification stage means ceding high-converting traffic to competitors who are present.

LLM Recommendation Triggers a Search Surge

The proof is in - LLMs can influence brand outcomes. Captify's AI & Open Web data shows how LLM recommendations directly impact real world brand consideration.

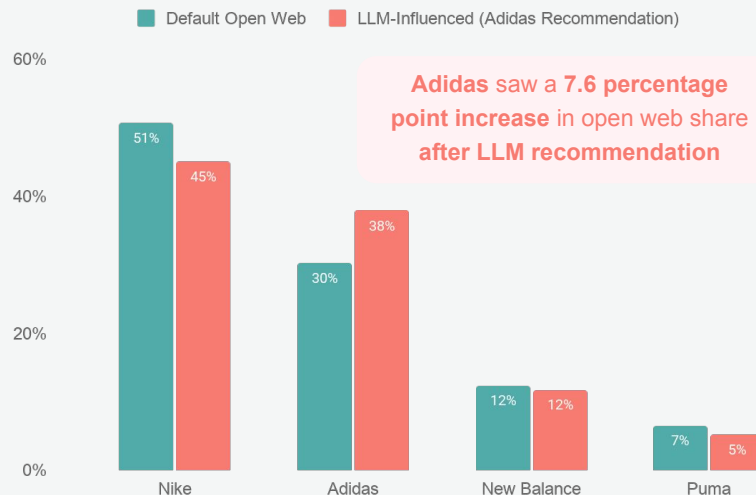
Exposure to AI endorsement delivers a tangible click-through effect, with Adidas seeing a 8 p.p. increase in open web search share among recommended users.

This demonstrates that AI isn't just a research tool but a powerful consideration engine; when an LLM picks a winner, consumers follow that advice directly into the open web to purchase.

FROM INSIGHT TO ACTION

Brands must treat LLM presence as a performance channel — optimising for AI visibility, sentiment, and endorsement is no longer optional; it is a directly measurable driver of brand consideration, search behaviour, and purchase intent.

Change in Open Web Share of Search following AI Recommendation

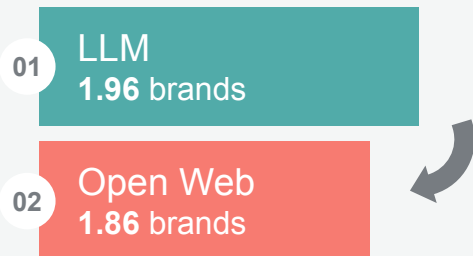


The Flexible Funnel: How AI Supports Consumers Across a Shifting Path-to-Purchase

Brand Consideration Breadth by Channel

Automotive Category, Research Phase Analysis

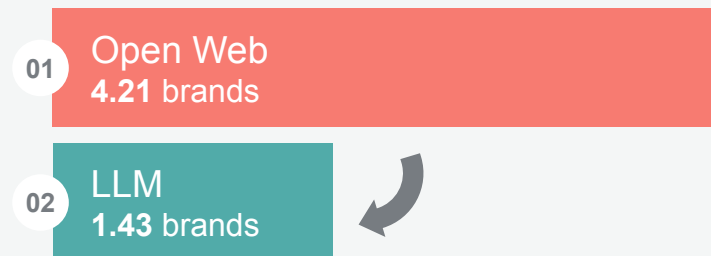
LLM First (22% of consumers)



Research starts in LLMs. Initial prompts are often unbranded as consumers explore category-level considerations.

Open Web serves as a source of validation and a next step towards direct contact, as consumers move closer to purchase decision.

Open Web First (78% of consumers)



Research starts in the open web. Consumers explore a wide range of brands as they curate a shortlist.

LLMs allow deep-dive analysis as consumers move closer to purchase decision.

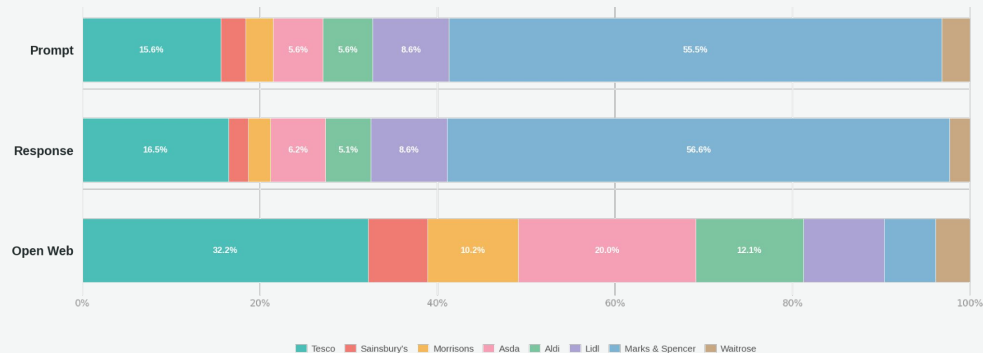
Grocery



The New Brand Battleground & The Search Only Risk for Supermarket Brands

Brand Share: Prompt, Response & Open Web & YoY Change in Search

Groceries & Supermarket - LLM Data



TESCO -1.8p.p



-0.1p.p



-0.2p.p

Sainsbury's -1.1p.p



+0.6p.p

M&S +2.7p.p

Tesco maintains a clear lead in open web search with a **32%** share, proving its 'Everyday Low Prices' strategy continues to capture the majority of active consumer intent.

M&S reveals a clear opportunity gap, dominating the AI landscape but failing to convert this into open web search. This indicates that whilst its reputation for quality and trends makes it a core consideration and recommendation within AI, they are missing out on open web search consideration.

Ranking second in LLM prompts (~16%), Tesco shows a strong alignment between what consumers search for and what AI models recommend, protecting its massive scale across both platforms.

Beyond the top two, most brands see a higher share on the open web than in AI responses, suggesting their digital presence isn't yet fully optimised for generative AI recommendations.

Personalised Diet Priorities & Brand Loyalty Dominate LLM Prompts

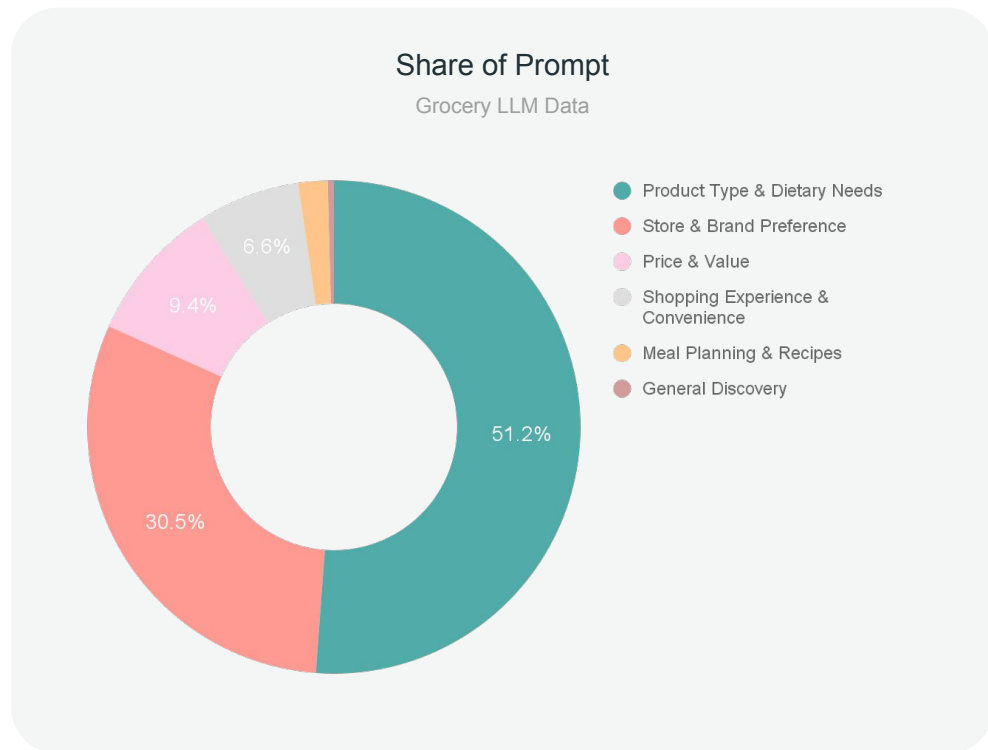
Dietary requirements dominate AI interactions with a **51%** share, as consumers leverage LLMs to navigate complex nutritional needs and bespoke meal planning.

Store and brand preferences account for **31%** of prompts, indicating that shoppers are using AI to validate their retail choices rather than just searching blindly.

Price and value remain critical; consumers are increasingly using LLMs for real-time price comparisons and deal-hunting to offset rising grocery costs.

KEY EMERGING TREND TO WATCH

Grocery consumers are turning to AI with clear intent — using it to personalise nutrition, validate brand choices, and hunt for value in equal measure, painting a vivid picture of a shopper who is informed, selective, and cost-conscious.



Consumers Consult LLMs for Curated Consumption Advice

Users now treat AI as a full-service concierge, using it to curate meal plans, generate tailored shopping lists, and price-match across retailers to combat persistent food inflation.

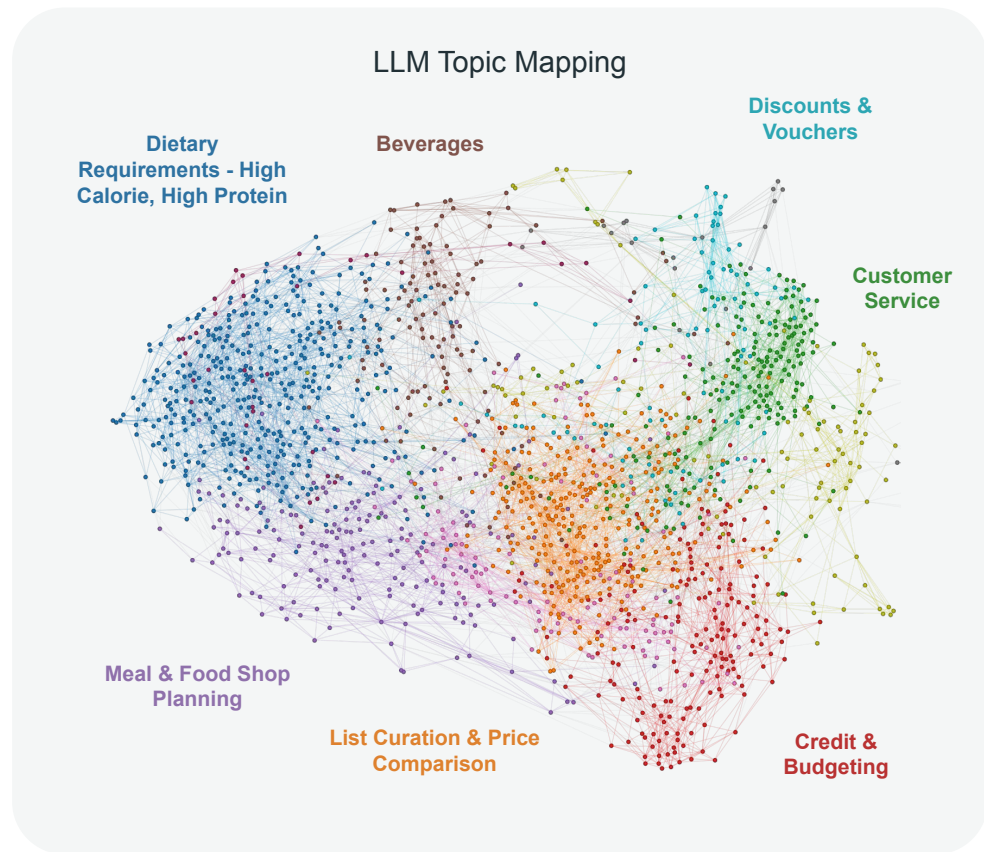
After finding the best value, consumers pivot to logistical customer service prompts—seeking opening hours and store locations—effectively using LLMs to bridge the gap between digital planning and physical retail.

LLM prompts are heavily skewed towards high-protein and high-calorie goals, reflecting a shift from calorie counting to nutrient density for muscle maintenance and fitness.

This closely aligns with beverage searches which are dominated by better-for-you alternatives, with a sharp focus on low-calorie mixers and alcohol-free spirits as alcohol-free lifestyles rise.

FROM INSIGHT TO ACTION

Grocery shoppers are using AI as an end-to-end planning tool, moving seamlessly from nutrition and meal curation to price comparison and store logistics. By combining these LLM signals with search data, Captify provides grocery and FMCG brands the intelligence to engage shoppers throughout the entire planning process, from inspiration to in-store arrival.



Moments that matter: mapping search intent across grocery calendar cycles

Top Groceries Moments

Top Groceries Trends

3.3x Father's Day

Gifting Groceries

- Candy, Sweets, Chocolate
- Alcoholic Beverages

Insight: A key grocery-relevant gifting and meal occasion. The strong index signals this audience plans around family celebrations, connecting to broader themes of family life and seasonal shopping.

2.5x Football World Cup

Hosting Essentials

- Grocery & Restaurant Delivery
- Alcoholic Beverages

Insight: Strong index confirms this audience plans around major football fixtures such as the World Cup— a natural grocery and entertaining occasion, particularly relevant for the market holding watch parties.

1.8x Moving House

Stock Up & Store Locations

- Grocery Stores
- Frozen Food

Insight: People moving home are establishing new shopping routines and stocking new kitchens — a key acquisition moment for grocery retailers and delivery services.

1.5x Weekend Getaway

Brunch & Booze

- Alcoholic Beverages
- Bakery Produce

Insight: Signals a spontaneous, experience-driven audience. Weekend trips often involve planning food and drink for travel or self-catering — a relevant grocery prompting occasion. Connects to the travel and active lifestyle threads in the narrative.

1.3x Time with Friends

Social Snacking

- Grocery & Restaurant Delivery
- Non-alcoholic Beverages

Insight: A social occasion micro-moment with direct grocery relevance. Planning time with friends drives purchasing of snacks, drinks, and entertaining essentials — particularly resonant given the audience's strong sporting and social calendar.

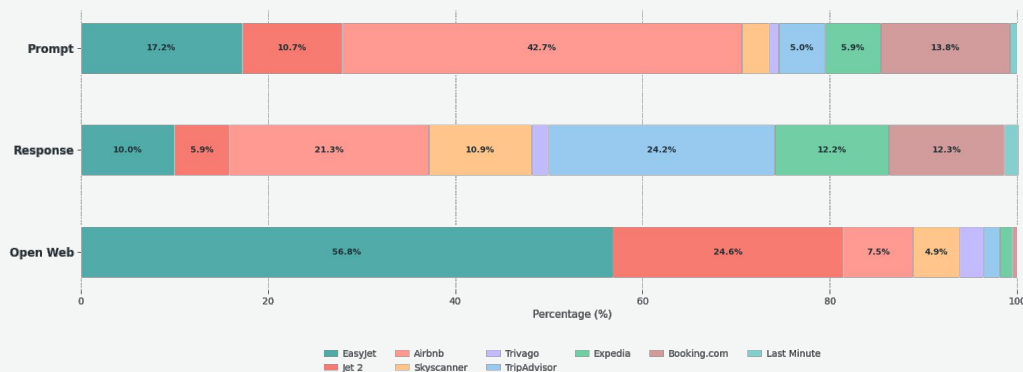
Travel



The Travel Trust Shift: Consumers Trade Search for AI Curation

Brand Share: Prompt, Response & Open Web & YoY Change in Search

Travel - LLM Data



Jet2 +5.1p.p

trivago -4.5p.p

Expedia -2.2p.p

easyJet +24.1p.p

Skyscanner -9.0p.p

Booking.com -0.4p.p

While budget carriers dominate open web search with a combined **82%** share, consumers are pivoting to AI models to query a broader mix of providers, with easyJet (**31%**) and Booking.com (**23%**) leading prompt interest.

Capturing **32%** share of response, TripAdvisor has successfully leveraged its deep review ecosystem to become the primary authority for LLM travel suggestions and excursion bookings.

Recommendations from LLMs are evenly split across Expedia, Booking.com, and Skyscanner (**~15% each**), indicating that showing the booking vendor recommendation is more equally split.

LLMs Emerge as Agentic Travel Agents

travellers are prioritising inspiration and discovery (**28%**) over specific logistics, using LLMs as digital brochures to explore new destinations before committing to a booking.

AI models are frequently prompted for how long and when best to go to certain destinations (**13%**). Consumers use LLMs for detailed itineraries and planning (**12%**) getting models to map out their trip day by day, including what experiences they should book for each day.

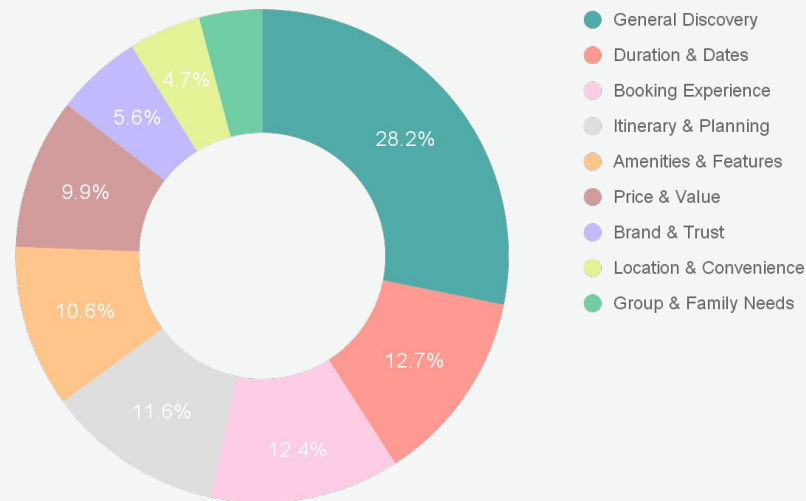
There is a growing preference for amenity-led discovery (**11%**), suggesting that the quality of the stay, and specific perks are now more influential in the AI prompt than price comparison alone.

KEY EMERGING TREND TO WATCH

AI use for travel inspiration has doubled in the last year, reaching 18% adoption among 25-34 year olds. Travelers are shifting from keyword searches (e.g., "cheap flights to Spain") to using AI as a creative co-pilot for tailored itineraries that adapt to real-time changes like weather.

Share of Prompt

Travel LLM Data



AI Trip Planning & Battle of the Bucket List Operator

LLM prompts are mainly focused on holiday curation and itinerary planning, especially for family/package holidays prioritising cheap flights.

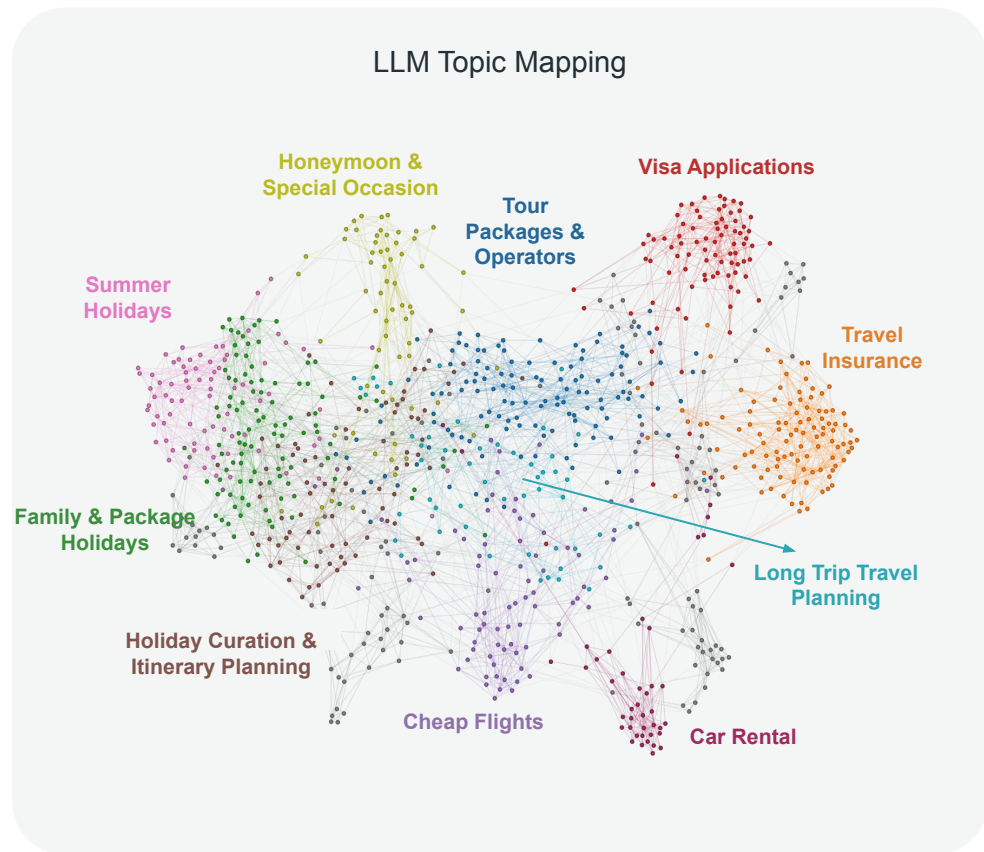
Consumers seek recommendations for 'where best to go' at certain times of the year, notably summer school holidays, honeymoons, and special occasions.

For backpackers and long-trip planners, LLMs handle functional logistics like transport links and route mapping. Travelers increasingly use AI to simplify 2026's heightened administrative burden, including UK-EU border changes (EES/ETIAS) and complex travel insurance.

High-volume conversations involve peer-to-peer vendor comparison, as shoppers use AI to audit providers and benchmark prices against occasion-specific value for competitive rates on big-ticket experiences.

FROM INSIGHT TO ACTION

Travellers are using LLMs to navigate every stage of their holiday planning - with long-tail conversations revealing richer signals around intent, consideration and expectations. Brands can work with Captify to combine LLM insights with search behaviour, building a complete view of the consumer funnel to reach the right traveller, at the right moment.



Moments that Matter: Mapping search intent across travel calendar cycles

Top Travel Moments		Top Travel Trends
2.5x	Football World Cup	Experience-Led Travel - Event Tickets - Hotels & Accommodation Insight: Strong interest in curated, experience-led travel beyond standard packages — fitting for an audience whose travel is anchored around specific events or cultural moments rather than generic holidays. Football fans actively prompt AI to research travel to fixtures, matchday travel and accommodation.
1.4x	Weekend Getaway	Speedy Staycations & City Breaks - Bus & Rail Travel - Hotels & Accommodation Insight: Directly maps to the event-travel behaviour of this audience — short, purposeful trips built around fixtures, tournaments, or cultural moments. A strong signal for travel brands offering flexible, short-break products.
1.4x	Road Trip	Road Trip Renting - Car Rental - Campers & RVs Insight: Staycations and European road trips drive high intent amongst travel audiences, as they prompt AI models to actively research multiple transport modes, reinforcing their status as active, multi-touchpoint travel planners.
1.3x	Last Minute Trip	Spontaneous Bookings - Car Rental & Taxi Services - Hotels & Accommodation Insight: Suggests this audience also acts on spontaneous travel decisions — potentially triggered by last-minute ticket availability or fixture announcements. Relevant for dynamic pricing and last-minute deal platforms.
1.2x	Payday	Big-spend Bookings - Holiday & Tour Packages - Flights Insight: This audience leverage payday with this being a critical moment for booking travel plans. They are actively in-market for full trip planning, making them a strong target for OTAs, tour operators, and package holiday brands.

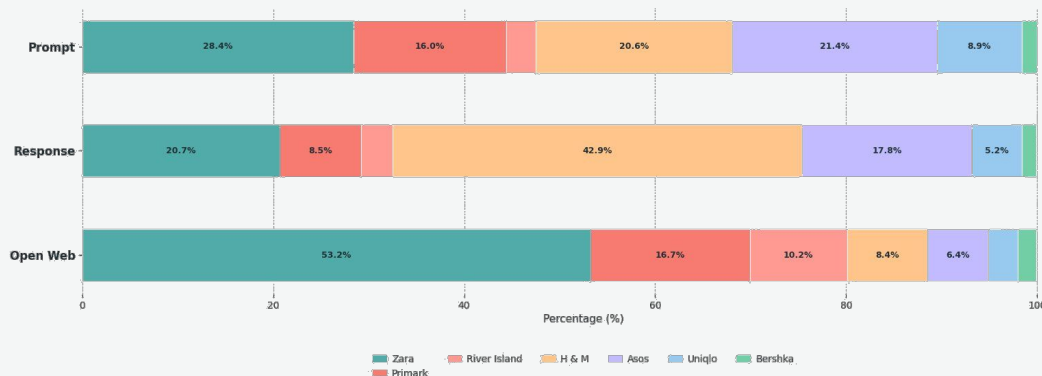
Fashion



Search Dominance in Fashion Doesn't Guarantee AI Influence

Brand Share: Prompt, Response & Open Web & YoY Change in Search

Retail Fashion - LLM Data



ZARA +29.1p.p

H&M -5.1p.p

RiverIsland +1p.p

PRIMARK -19.7p.p

ASOS -5.3p.p

BERSHKA +1p.p

While leading the open web with a **53%** share of search, Zara's visibility drops significantly to **21%** in LLM responses, suggesting traditional SEO authority isn't translating into AI-driven recommendations.

H&M has secured an early AI-First advantage. Capturing a commanding **43%** share of LLM responses, H&M successfully outpaces competitors in conversational environments where brand sentiment and structured data are key.

ASOS and Primark are winning the consumer prompt. ASOS leads prompt intent at **21%**, closely followed by Primark (**18%**), indicating that these brands are top-of-mind for users seeking AI-powered styling advice or product discovery.

Brands like Uniqlo and ASOS over-index in LLM conversations compared to search, whereas Zara and River Island remain reliant on traditional web discovery to maintain market share.

AI: The New Personal Shopper & Stylist

Online shopping is being boosted by AI adoption for fashion advice and assistance (**+44% YoY**), with consumers utilising conversational search tools for detailed style inspiration, brand identification, and trend research.

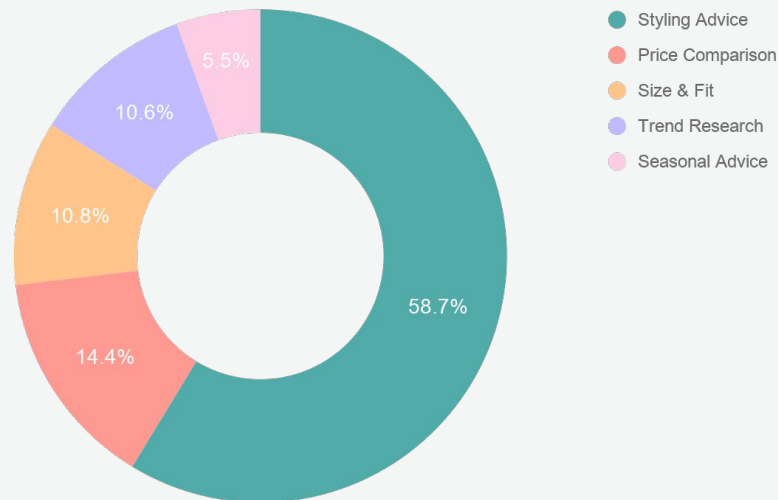
Across LLM models including Gemini and ChatGPT, consumers making fashion related searches are most likely to search for personal and occasional styling advice (59%) such as 'what to wear to' and 'how to style'.

Pricing (**14%**) is another key consideration, with consumers using their first prompt to gather affordable options, dupes and best deals for fashion purchases.

LLM prompts around what clothing suits specific body types, height and silhouettes also deliver a notable **11%** share, highlighting a gap for brands and advertisers to address.

Share of Prompt

Fashion LLM Data



Generative Design & Personal Style Prompts

Consumers are pivoting from basic search to active creation, using AI to prototype product designs and execute specific image edits, such as digital try-ons or altering garment colours.

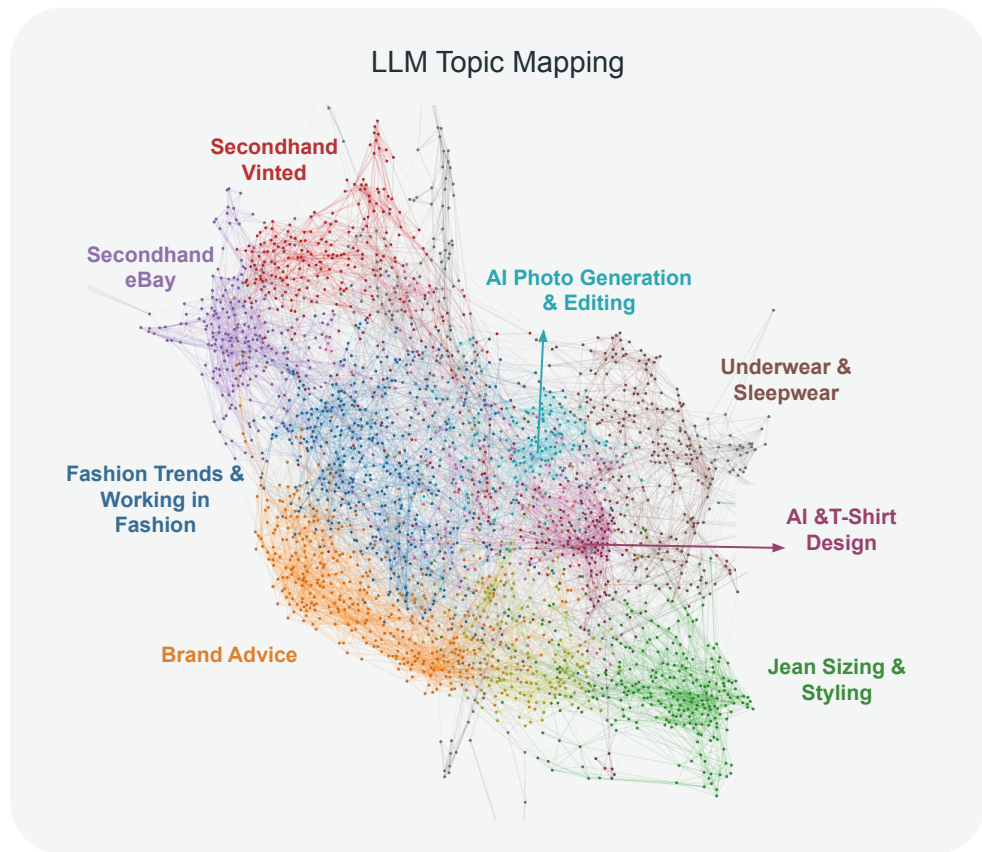
High volumes of prompt-based conversations around denim and silhouette-specific advice indicate that users now view AI as an expert consultant for age-appropriate and body-inclusive styling.

Resale demand has doubled as "vintage" and "designer" become synonymous with value; AI is now being leveraged to hunt for deals and optimise Vinted listings for faster sales.

The convergence of sustainability and AI suggests a future where consumers expect models to curate bespoke, second-hand wardrobes based on individual aesthetic and budget constraints.

FROM INSIGHT TO ACTION

Fashion consumers are no longer just browsing — they're designing, consulting, and deal-hunting through AI. Captify's combination of LLM and search data allows brands to intercept this new AI-driven discovery layer, connecting inspiration to purchase intent to proactively stay ahead of demand.



Moments that Matter: Mapping search intent across fashion calendar cycles

Top Fashion Moments

Top Fashion Trends

7.1x Wimbledon

Aspirational Accessories

- Occasion Wear
- Accessories

Insight: Wimbledon is one of the 's most fashion-conscious sporting events, with strong associations to premium style, dress codes, and aspirational British culture — a natural fit for fashion brand messaging.

1.4x Planning a Holiday

Shopping Basket to Suitcase

- Footwear
- Swimwear

Insight: Consumers are looking for a new holiday wardrobe, especially sandals (33%), swimwear (24%) and accessories. These are strictly seasonal items that often get renewed annually to fit micro-trends.

1.3x Payday

Small Items & Big Price Tags

- Accessories
- Footwear

Insight: Payday is a critical moment for many shoppers as they use the influx of money to treat themselves. In particular, items with larger price tags such as bags & jewellery (67%) and footwear (8%).

1.2x Coachella

Festival Fashion

- Festival Tops
- Dresses & Skirts

Insight: Coachella is a pivotal moment in the fashion calendar. Consumers closely watch attendees, celebrities, and influencers for the latest trends and festival inspiration. This event frequently drives micro-trends, often leaning towards a desert western aesthetic.

1.2x Black Friday

Discount Designer & Deals

- Designer Clothing
- Outerwear

Insight: Black Friday is a significant annual event where fashion consumers seek out the best deals. They use the day to make high-value or large-basket purchases, taking advantage of discounts and savings. Consumers frequently plan their purchases in advance to be prepared for the day.

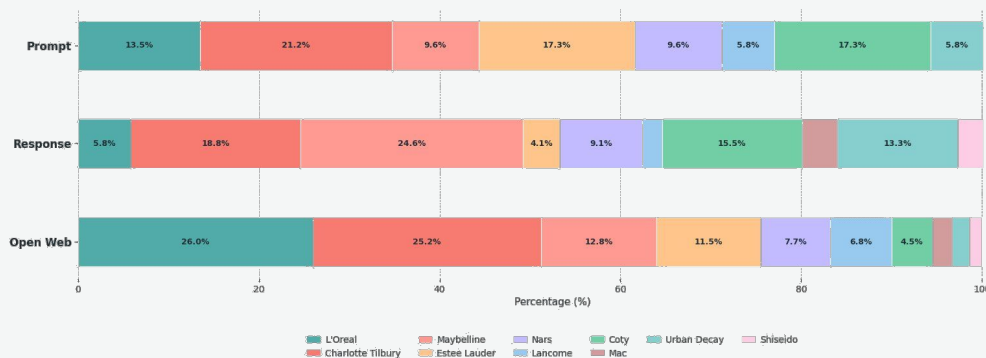
Beauty



AI Reorders the Beauty Funnel

Brand Share: Prompt, Response & Open Web & YoY Change in Search

Beauty - LLM Data



L'ORÉAL -1.8p.p

ESTÉE LAUDER +0.7p.p

MAYBELLINE NEW YORK -0.p.p

Charlotte Tilbury +3.1p.p

NARS -1.9p.p

LANCÔME PARIS +1.2p.p

L'Oreal and Charlotte Tilbury dominate the open web, capturing a combined **25%** share of search and cementing their status as the primary drivers of mass-market consumer awareness.

LLM prompts reveal a shift in brand recall, with Maybelline (**21%**), Coty (**17%**), and Estee Lauder (**17%**) leading direct consumer inquiries within AI interfaces.

Maybelline and Charlotte Tilbury lead AI share of response, as these brands are most frequently recommended by LLMs, likely due to their extensive digital footprints and high-volume review data.

LLMs bridge the discovery gap for niche players, where brands like Urban Decay and Shiseido gain significant visibility through AI-driven comparisons, while L'Oreal's dominance drops by 20 percentage points in AI responses.

The AI Beauty Guru & Virtual Aesthetician

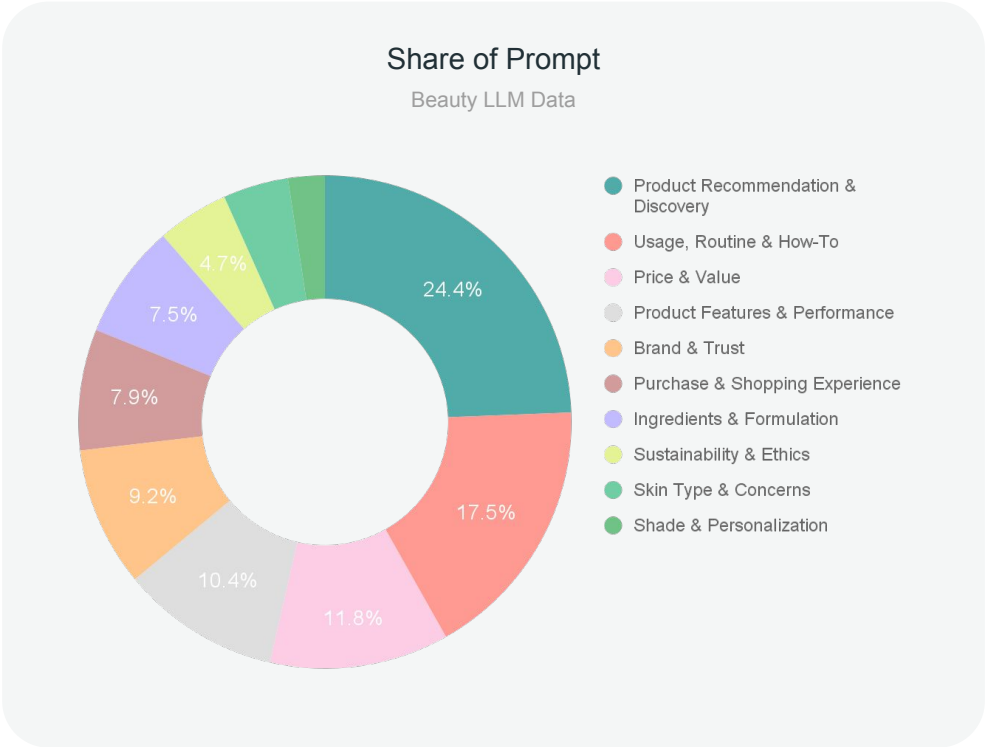
LLMs now command a **24%** share of prompts for product discovery, as consumers move away from traditional search engines toward AI for finding trending and personalised beauty recommendations.

High demand for step-by-step ‘how-to’ guides and curated morning/evening routines suggests users now view AI as a trusted beauty expert for technical regime building.

Beyond simple trends, shoppers are interrogating AI on ingredient efficacy, formulations, and brand trust, making granular product transparency a critical factor for conversion in AI-led journeys.

FROM INSIGHT TO ACTION

These trends signify that consumers want validation in a trusted environment - beauty consideration and purchase is driven by expert-backed recommendation. Brands should highlight this across campaigns and marketing as well as online to ensure LLM pick up these science-backed / expert backed when consumers prompt this into AI models.



Consumers Trust LLMs for Expert-Backed Skincare and Beauty Tips

LLMs act as the primary search engine for discovery, with conversations heavily skewed towards product recommendations and tailored regimes across hair care, fragrance, and makeup.

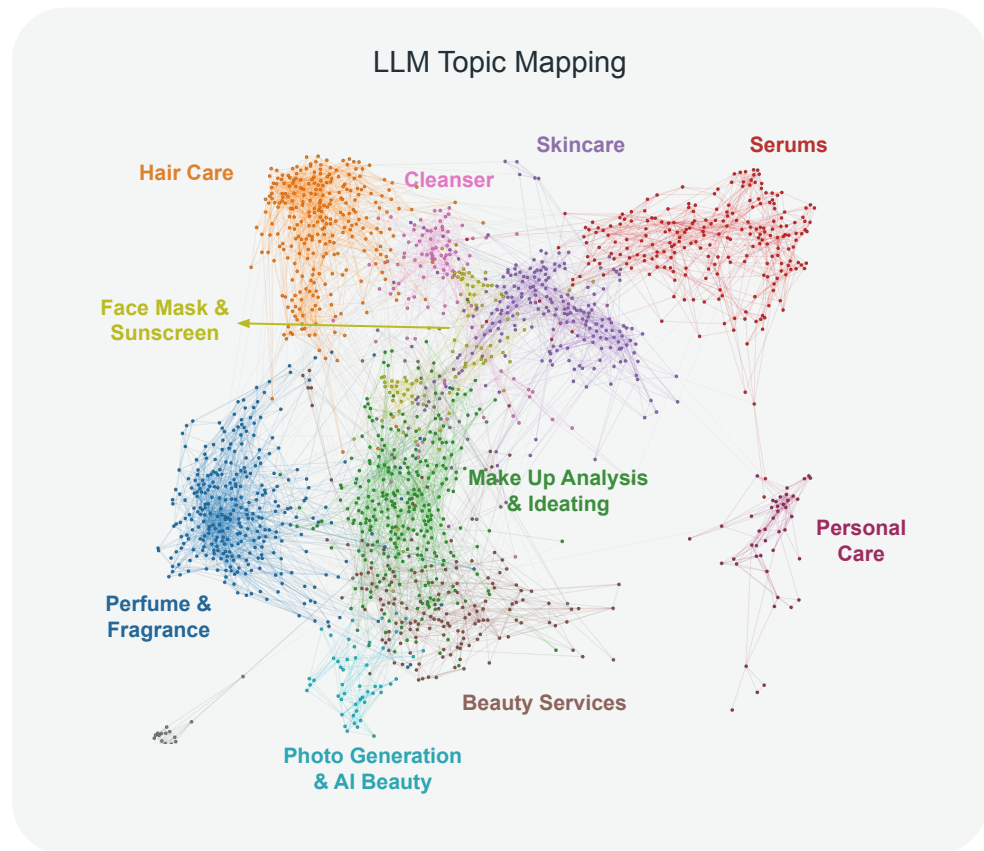
Skincare dominates LLM conversations, with consumers seeking high-intent advice on technical staples like cleansers, serums, and SPF to build efficacy-led regimes, while using AI to troubleshoot skin concerns like acne or cakey makeup application.

AI has become a risk-mitigation tool, as users leverage photo generation and makeup ideation to 'test-run' hair colours and trends with virtual image creation before committing to a physical change.

Reflecting the broader trend for clinical credibility, shoppers treat LLMs as trusted advisors, expecting the same level of expertise they would receive from doctor-led or science-backed brands.

FROM INSIGHT TO ACTION

As beauty consumers pivot from passive browsing to active AI consultation, the role of LLMs has shifted from simple chatbots to authoritative experts. Brands must align their digital presence with this "scientific" and "expert-led" search behaviour.



Moments that Matter: Mapping search intent across beauty calendar cycles

Top Beauty Moments

Top Beauty Trends

6.5x Wimbledon

Aspirational Aesthetics

- Fragrance
- Luxury Cosmetics

Insight: Wimbledon is a key British cultural event tied to polished, aspirational beauty aesthetics (groomed, occasion-ready looks). The audience's active use of AI tools for this moment signals high intent for beauty products, making it a prime targeting window for beauty brands.

1.3x International Women's Day

Self Love Skincare

- Skincare
- Fragrance

Insight: A culturally resonant moment with direct relevance to beauty brand messaging around empowerment, self-expression, and female identity. The solid volume and index make this a meaningful targeting window, particularly for campaigns with a values-led or celebratory tone.

1.4x Planning a Holiday

Pre-Holiday Glow Up

- Beauty Services
- Travel Size Products

Insight: Travel micro-moments are strong beauty purchase triggers — travel-size products, holiday makeup, and skincare prep all align with this signal. The solid volume and index make this a commercially relevant moment for beauty brands, particularly those with travel retail or gifting ranges.

1.2x Payday

Restocks & Payday Treat

- Luxury Cosmetics
- Beauty Tools

Insight: Consumers utilize payday to restock on their favourite beauty products and leverage the increased disposable income to indulge in more expensive, luxury cosmetics and beauty tools as a payday treat.

1.2x Festivals

Sweat-Proof & Festival Fresh

- Make Up
- Personal Care

Insight: Festival makeup differs significantly from everyday looks, often featuring brighter, bolder colors. Festival-goers prioritize long-lasting, sweat-proof products. Additionally, personal care items—for camping or daytime refreshing—are highly sought after.

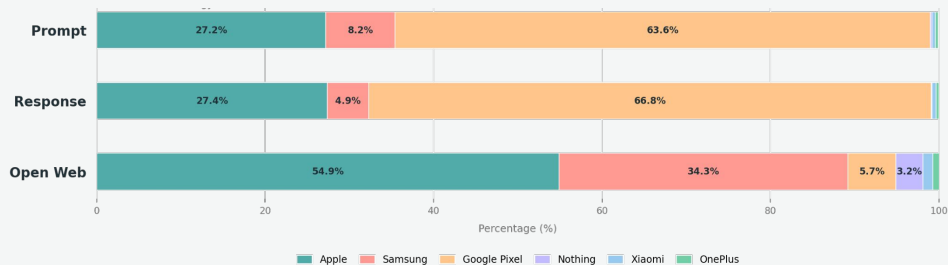
Tech



Beware of AI Bias: Is Google Pixel over performing in AI because of Gemini?

Brand Share: Prompt, Response & Open Web

Technology - LLM Data



+6.9p.p



-6.6p.p



-0.p.p

SAMSUNG

+2.7p.p

NOTHING

-2.7p.p



-0.4p.p

Apple's ecosystem still dominates open web search, capturing **55%** share as their solid ecosystem, including hardware like the iPhone 17 and AirPods, drive high-intent consumer consideration.

Samsung retains a strong secondary position with **34%** of search, though both leaders face an AI visibility gap as traditional search shares fail to translate into LLM dominance.

Google has successfully pivoted from a **6%** traditional search share to a commanding **67%** of AI responses, likely leveraging Gemini's integration to lead the conversational shift.

Leading brands face a critical threat as their share of AI conversation plummets by over 25p.p., highlighting an urgent need to integrate deeper into the prompt-and-response layer.

Using AI to Research Hardware & Shop Smarter

Over 50% of consumer prompts across LLM models (Gemini, ChatGPT) focus on core hardware (camera, battery, storage), not speculative AI features dominating brand marketing.

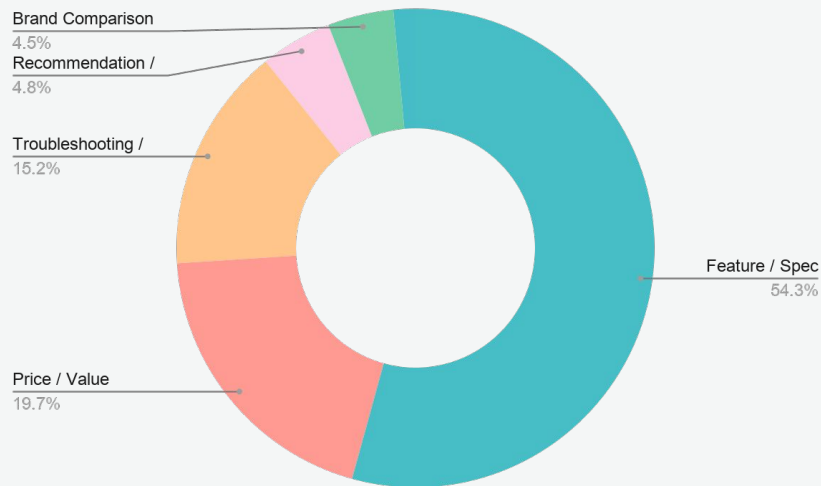
Price comparisons make up **20%** of AI searches, focusing on discounts/value, indicating consumers use AI as a pragmatic shopping assistant, not a troubleshooting tool.

While Apple (**43%**) and Samsung (**41%**) lead overall search volume, Google Pixel has the greatest share of LLM prompts (**48%**) and responses (**56%**), suggesting AI assistants actively steer users toward Pixel's integrated ecosystem despite user loyalty to legacy leaders in traditional search.

FROM INSIGHT TO ACTION

The data suggests a growing disconnect between what brands are selling (AI capabilities) and what consumers are actually using AI for (granular research). Brands must pivot messaging from 'AI-first' to 'AI-enabled utility' ensuring that technical specifications are prominent within LLM training data.

AI Feature Share of Prompt



Consumers Compare Features, with Battery Health being Key

Apple's hardware updates like the iPhone 17's Dynamic Island and ProMotion drive interest, with consumers increasingly comparing the portability of the iPhone Air and the performance of the Pro Max.

While camera quality is a dead heat with Samsung, battery health has become the primary benchmark for Apple's innovation—and its leading source of negative sentiment alongside rigid, high-cost contracts.

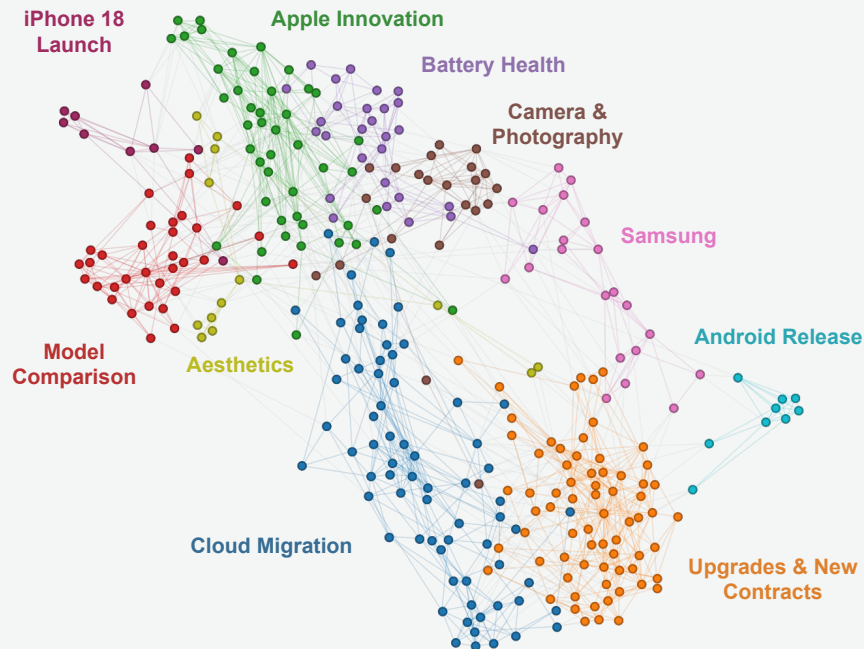
Positive engagement is fueled by advanced videography and 'status' finishes like Cosmic Orange, with users increasingly leveraging LLMs to curate a bespoke aesthetic for their devices through cases and digital customisation.

Beyond hardware costs, the pain of data migration remains the biggest hurdle for upgraders, highlighting a major opportunity for networks to streamline the transition.

FROM INSIGHT TO ACTION

To convert high-interest aesthetic browsers into buyers, network providers must pivot from hardware-centric marketing to frictionless transition packages that combine flexible mid-contract upgrades with expert-led, guaranteed data migration services.

LLM Topic Mapping



Moments that Matter: mapping search intent across tech calendar cycles

Top Tech Moments

Top Tech Trends

2.5x

Black Friday/
Cyber Monday

Smart Home Savings

- Smart Home
- Wearables

Insight: During Black Friday and Cyber Monday, deal-hunting consumers capitalise on steep discounts to secure big-ticket upgrades, driving a 1.4x spike in smart home tech—specifically targeting the latest AI-integrated speakers and security doorbells.

1.5x

Job Promotion

Fresh Start, Fresh Tech

- Laptops & Computer
- Phones & Tablets

Insight: Job promotions act as a dual-trigger for premium tech sales: professionals seek high-performance upgrades to match their new responsibilities, while simultaneously viewing latest-model laptops and wearables as a reward for their career progression.

1.5x

Payday

Payday Presents

- Wearables
- Phones & Tablets

Insight: Payday is a critical moment for many shoppers as they use the influx of money to treat themselves. In particular, consumers consider tech accessories such as smart watches (1.2x) and mobile phone handset upgrades (1.2x).

1.3x

Graduation

New Job, New Device

- Wearables
- Laptops & Computer

Insight: Graduation serves as a powerful 'new start' catalyst, mirroring the upgrade cycle seen with job promotions. Consumers are investing in new laptops and wearables to equip themselves for the professional world with a premium tech upgrade.

1.3x

Back to School

Laptops for Learning

- Laptops & Computer
- Audio Visual

Insight: The Back to School season marks a critical pivot for ed-tech; demand for laptops surges by 1.6x as students gear up for the academic year, while headphones become essential tools for focused study and immersive learning.

What This Means For Your Brand

Presence in the prompt layer is the new prime real estate

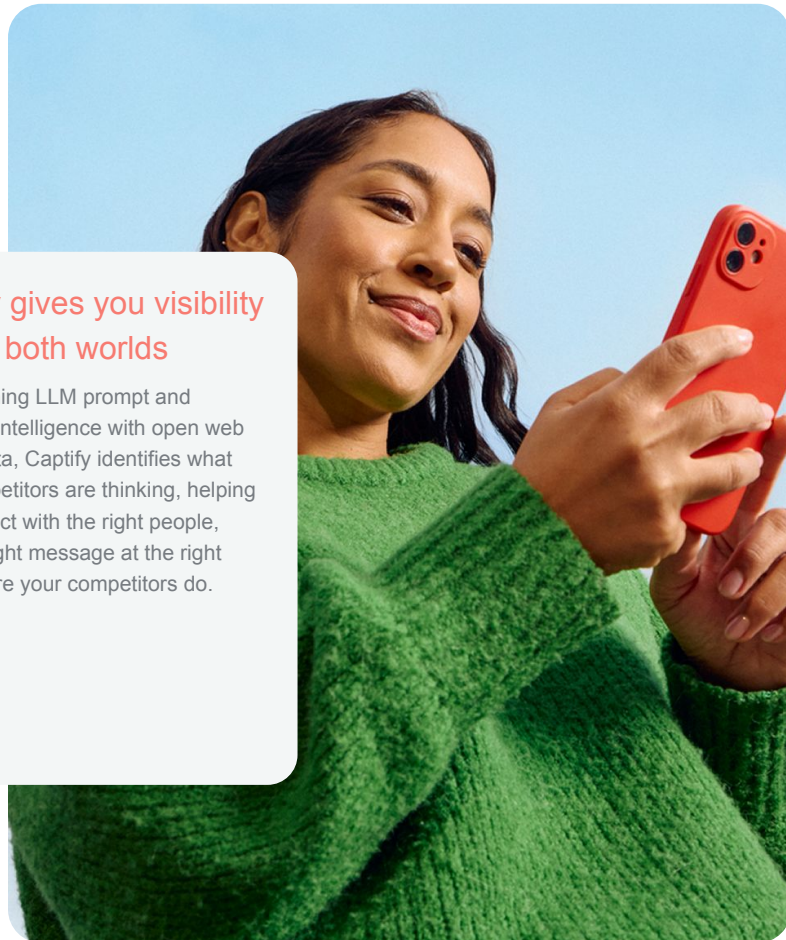
Consumers are making high-intent decisions before they ever reach your website. Brands absent from LLM responses are ceding purchase-ready traffic to competitors who are present. And with 75–85% of conversions happening within 14 days of the first prompt, the window to act is narrow.

Search investment alone is no longer enough

Legacy search dominance does not translate to AI influence. With performance gaps of up to 27 p.p. across LLM vendors, brands need to be aware of holistic intent. The funnel has shifted and brands need be well positioned to address this.

Captify gives you visibility across both worlds

By combining LLM prompt and response intelligence with open web search data, Captify identifies what your competitors are thinking, helping you connect with the right people, with the right message at the right time, before your competitors do.



The ecosystem is untangled with **captify**®

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