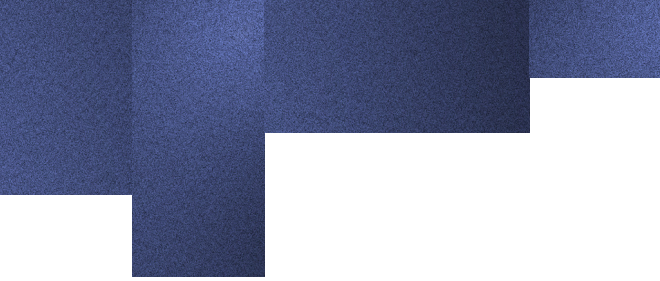




iDHL

The state of AI search 2026





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Executive summary

A new benchmark for understanding AI powered discovery.

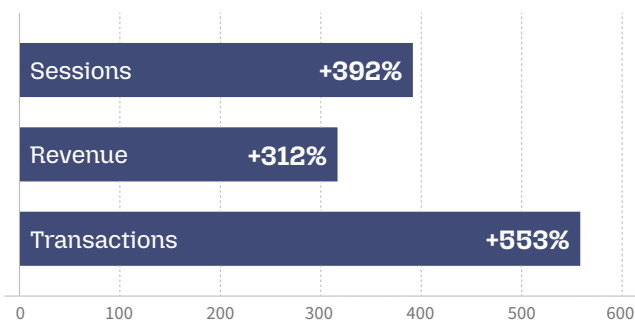
Based on 1.5 million AI search engaged sessions across 175 websites and 20 industries, *The State of AI Search* report provides one of the most comprehensive cross-sector views yet of how AI-powered discovery is changing the way people find, compare and choose brands online.

Until now, much of the discussion around AI search has been driven by predictions about what might happen next. This report focuses on what is happening today.

From early adoption to commercial impact

What emerges is how AI search is moving from early adoption to measurable commercial impact. The findings reveal that AI search engaged sessions have increased 392% year on year, showcasing the rapid adoption base. Also, revenue from AI search visitors grew 312%, and with transactions rising even faster at 553%, this suggests AI-powered discovery is starting to influence higher-intent customer journeys, not just top-of-funnel research.

The scale of that shift is transparent.



ChatGPT Ads are emerging, but not yet replacing established channels



For now, ChatGPT Ads should be viewed with curiosity rather than certainty.

It is still emerging, and marketers should avoid treating them as an immediate replacement for established channels.

But they should be paying attention. Early signs suggest that AI-led discovery could influence how budgets are planned, how audiences are reached, how transactions happen, and how brands think about visibility before the click.

Tom Walkden

Media Strategy Director IDHL

ChatGPT leads, but Gemini and Claude are gaining ground

While **ChatGPT remains the dominant source of AI search traffic at 91%**, newer platforms, including Gemini, Claude, Copilot and OpenAI Search are gaining momentum, creating a more competitive landscape for brands seeking visibility within AI-generated answers.

This means visibility can no longer be built around one platform alone, particularly as Google and Microsoft push AI deeper into search, devices and workplace tools.

AI search is starting to follow seasonal demand

Perhaps most importantly, the data suggests AI search is beginning to follow the same seasonal patterns, category spikes and shifts in consumer demand that have long shaped traditional search.

Advice around seasonal planning



AI visibility doesn't start when someone asks ChatGPT or Gemini a question. It starts months earlier with the content and recommendations that shape how a brand is understood online.

Seasonal PR planning plays an important role because it creates opportunities to appear in trusted editorial coverage, affiliate content and 'best-of' product lists tied to key consumer moments.

Those placements – which can be generated via a mix of paid and earned tactics – not only have the potential to reach audiences directly but can also increase the likelihood of brands being surfaced when AI platforms generate seasonal product-led recommendations.

Cheryl Crossley
Head of PR IDHL

In the earlier stages, AI search traffic largely grew month after month because volumes were low and adoption was rapid. As usage grows, AI search is starting to reflect familiar seasonal demand patterns. Retail activity is building around Q4 and January sales, travel interest rises from Boxing Day into the new-year planning window, beauty follows the golden quarter, and property searches lift after Christmas.

Methodology

This report is based on aggregated client performance data from IDHL's reporting ecosystem, designed to understand how traffic from large language model platforms is changing across sectors, markets and commercial outcomes.

Dataset

- 175 Google Analytics 4 profiles
- 70 brands
- 20 industries
- UK and US brands
- 13-month period analysed (July 2025–July 2026)

Metrics analysed

- AI search engaged sessions
- AI-attributed revenue
- AI search transactions
- LLM referral source
- Sector and market trends

Tracked LLM platforms

- ChatGPT
- Perplexity
- Gemini
- Claude
- Open AI Search
- Copilot

Definition of an LLM referral

Any session recorded in GA4 with a referral source from an LLM platform. To be tracked, a user must have clicked a referring link within an LLM-generated answer and accept cookies on the client site.

What qualifies as an engaged session

An engaged session is one that lasts longer than 10 seconds or includes at least one key event (such as interacting with a contact form) or includes two or more page or screen views.

Data limitations

Some datasets are smaller in specific areas of this report due to segmentation. When brands are added to the system, only the previous 13 months of data is stored. This means some brands have the full 24 months of data shown in the report, while others have 13 months or more.

Some EU data from clients with international domains may appear in the UK search engine data pool. Multiple GA4 profiles may also apply to a single client.

Key findings

The tables below provide a snapshot of the report's key findings, from overall growth and platform performance to market differences and sector seasonality.

AI SEARCH IN NUMBERS

Stat	What it shows
1.5m AI search engaged sessions analysed	A robust view of AI-led discovery across sectors
175 websites reviewed	The data reflects broad brand performance, not a single-category trend
20 industries covered	AI search is emerging across retail, travel, finance, property, legal and professional services
+392% YoY session growth	AI search is becoming a mainstream discovery behaviour
+553% YoY transaction growth	AI search is increasingly influencing purchase-ready journeys
+312% YoY revenue growth	AI search is now delivering measurable commercial impact
14x faster than organic search	AI search is outpacing established digital channels
+28% organic search growth	Traditional search is still growing, but at a much slower pace
+19% paid search growth	AI discovery is growing faster than paid acquisition
+25% direct traffic growth	Customers are increasingly arriving through AI-led journeys
+23% all-channel growth	AI search is outperforming the wider traffic mix

AI SEARCH BY PLATFORM

ChatGPT dominates

AI search platform	YoY growth	Share of AI search sessions	Key takeaway
ChatGPT	+402%	91%	Still the dominant AI search referral source
Gemini	+404%	2.8%	Growing quickly as Google embeds AI deeper into search
Perplexity	+114%	8.4%	Smaller share, but still part of the discovery mix
Copilot	+313%	2%	Important for workplace and B2B search behaviour
OpenAI	+17,876%	1%	The fastest-growing platform, but small current share
Claude	+1,183%	0.8%	One of the fastest-growing platforms, but again, a small current share

UK VS US

Two markets moving at different speeds

Market	YoY AI search engagement growth	Sessions reviewed	July 2026 growth	What it suggests
UK	+413%	1.45m	+107% YoY	Faster acceleration, with July marking a third consecutive record month
US	+302%	214k	+115% YoY	Smaller sample, but signs of more mature AI search

SECTOR SEASONALITY

The new AI search calendar

Sector/ category	AI search pattern	Peak moment	Planning implication
Jewellery	Sessions peaked at nearly 5x their summer level	November	Golden Quarter visibility needs to be built before autumn demand accelerates
Gifting	Peaked at around 10x July levels	December	Festive discovery is already happening through AI assistants
Fashion	More than doubled month on month, up 142%	Spring/pre-Christmas uplift	Content should support occasion, style and suitability-led decisions
Trade / DIY	Ran 7.5x ahead of the previous year	High summer	Home-improvement AI visibility should be planned ahead of summer demand
Home / Garden	Up 41% in June and almost 7x higher YoY	June	AI search is reflecting seasonal home improvement behaviour
Travel	Searches nearly tripled, with sessions up 168% YoY	December and May	Travel brands need visibility ahead of winter getaway and summer holiday planning
Property	Spiked after Christmas	January/February	AI search follows the post-Christmas house-hunting cycle
Legal	Generally stable	No clear seasonal peak yet	Some sectors need always-on authority rather than peak-led planning

AI search is accelerating

AI search is no longer just where curiosity starts. It's becoming a measurable channel for discovery, decision-making and commercial growth.

The pace of growth is surging, as:

- **sessions more than doubled year on year in July**
- **tripled over the most recent quarter**, and
- **grew nearly five-fold across 13 months.**

Findings also show that AI search is now outpacing every major acquisition channel, growing roughly 14 times faster than organic search, which increased 28% over the same period, compared with 19% growth for paid search, and 25% for direct traffic.

AI SEARCH VS OTHER CHANNELS

Channel	Growth (YoY)
AI search	+392%
Organic search	+28%
Direct	+25%
Paid search	+19%
All channels combined	+23%

Transactions are rising even faster than traffic, up 553% YoY, which suggests AI search is becoming a real commercial opportunity for brands. In total, **21,141 transactions were generated through AI.**

THE HEADLINE STATS

YoY (July 2026)	Sessions	+392%
	Transactions	+553%
Most recent month (July 2026)	Sessions	+109%
	Transactions	+190%
Most recent quarter (May 2026–July 2026)	Sessions	+205%

Monthly AI search engaged sessions

AI search is now shaping measurable consumer action at every stage from first brand discovery, through website visits, to completed purchases. For brands, that marks the moment AI search shifts to a channel that has to be planned, measured, and optimised like any other.

Businesses also need to consider how AI platforms consume, interpret and act on their own digital experience.

Claire Taylor, Managing Director of IDHL's Web Division, says brands need to optimise for both human users and machine agents as more customer journeys become mediated by AI.



We have seen a strategic shift from not only human users, but machine agents too. As more of the customer journey from research through to decision-making is now mediated by AI, businesses need to ensure their digital experiences are optimised for both, including the new user in town.

It's no longer a one-way information flow, it's a full-blown conversation between your site and the LLM, where your website must be structured to inform, support and enable AI-driven decision making.

Claire Taylor

Managing Director Web Division IDHL

AI search is turning seasonal

AI search demand used to look flat, but it doesn't anymore. Thirteen months of engaged-session data across 20 industries shows it peaking and plateauing in step with the real-world buying cycles.

Understanding when your sector peaks now needs to become a planning decision. However, seasonality should not be mistaken for a slowdown. While the data shows AI search beginning to follow recognisable sector peaks, overall engagement is still rising sharply.

Headline finding: Spring & Summer 2026 surge across the board

Sector highlights

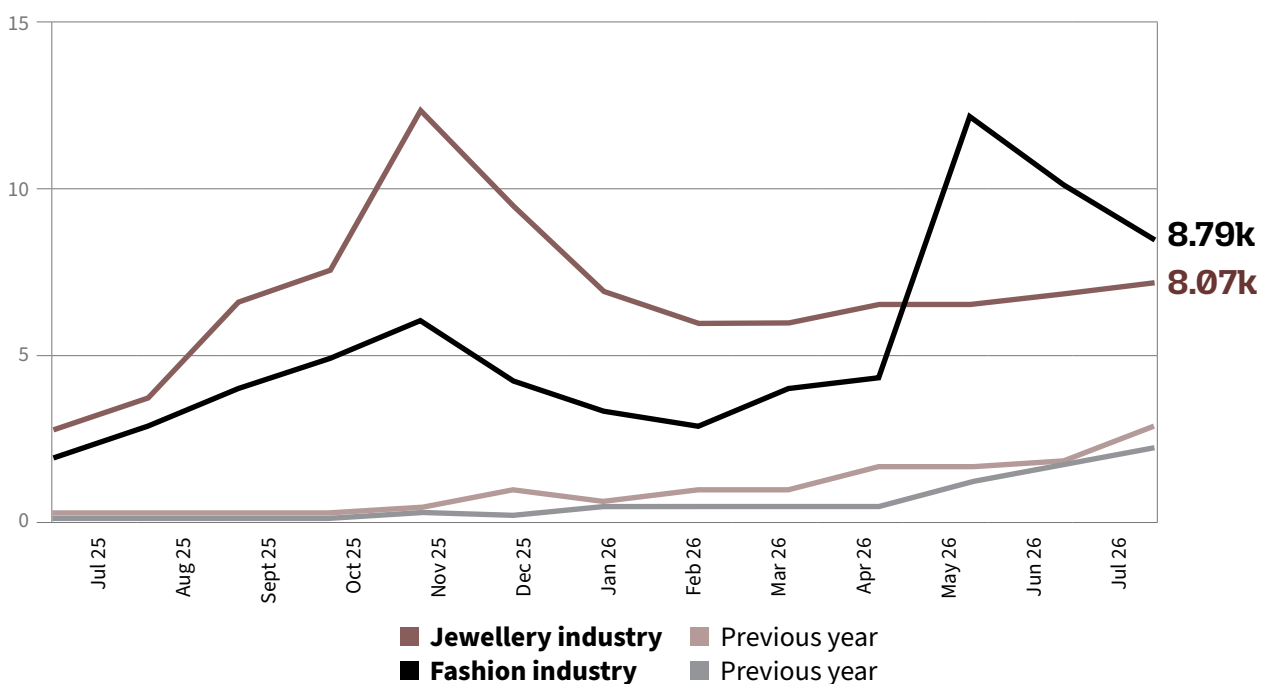
- **FASHION** more than doubled month on month, up **142%**
- **TRADE and DIY** ran **7.5 times ahead of the previous year**
- **PROFESSIONAL SERVICES** – **1.8 times ahead of the year before**
- **TRAVEL** searches have **nearly tripled in a year**
- **JEWELLERY** peaked nearly **5 times in Nov 2025**

Part of this uplift appears to be linked to a wider industry shift, with more clickable links appearing in ChatGPT results from May onwards. More visible links create more opportunities for referral traffic, which may explain why many sectors saw AI-search sessions step up at the same time.

Retail's festive rhythm has already arrived in AI search

Jewellery peaked in November, its strongest month of the year, and Gifts peaked in December, both landing exactly where traditional retail does. Both are on the way back up, too. Gifts peaked in July, its best month since December, which suggests the festive build-up is starting earlier than most planning cycles assume.

RETAIL: THE GOLDEN QUARTER November, Christmas and January sales



Previous year compares the corresponding months from July 24–July 25.

Summer home-improvement cycles

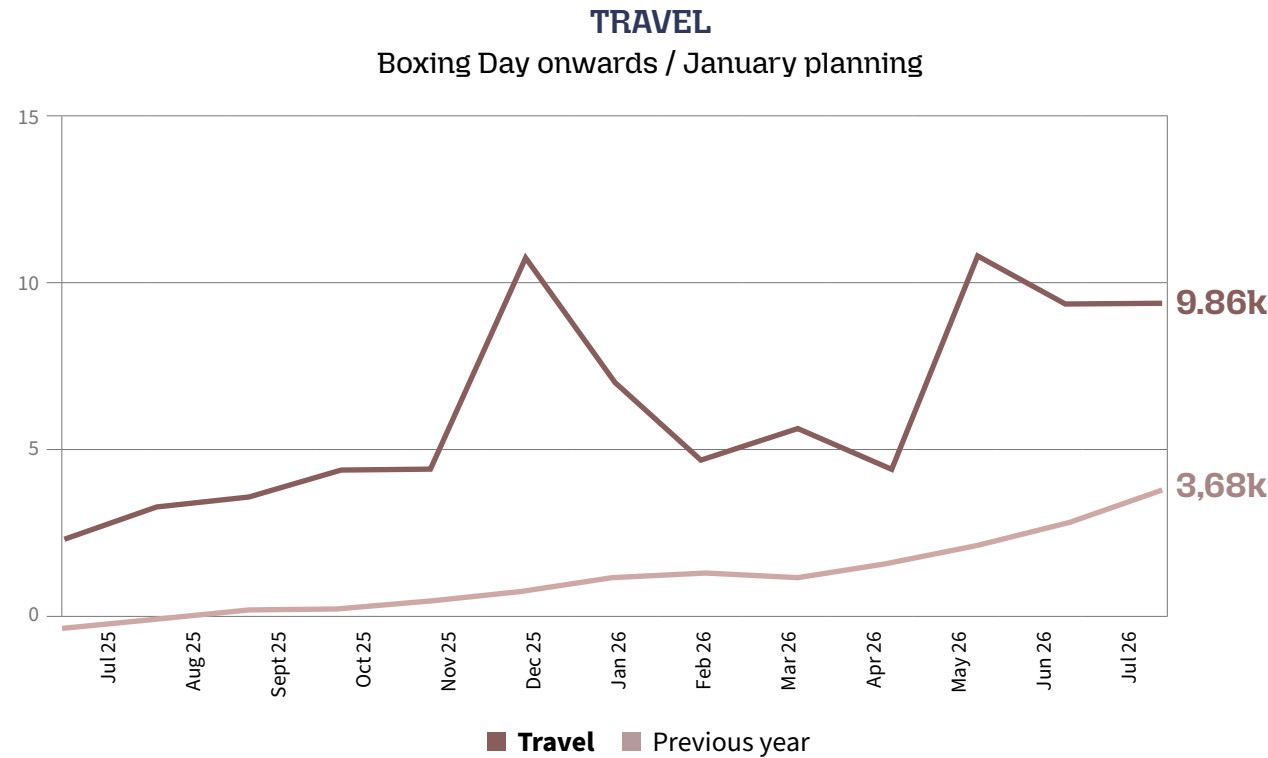
- **Trade and DIY nearly doubled in June**, making it the sector's biggest month by a wide margin.
- **Home and Garden** also hit a new record, **up 41% in June and almost seven times higher than the year before.**

Together, they point to a clear summer home-improvement cycle playing out in AI search.

Travel shows a twin-peak booking pattern

Travel searches through AI assistants have nearly tripled in a year, with engaged sessions across travel brands rising 168% between July 2025 and July 2026, and running as much as 62 times higher than the equivalent period before AI search took hold.

December and May were the record peak months reflecting the winter-getaway and summer-holiday waves you'd expect, only now happening through AI search.



Previous year compares the corresponding months from July 24–July 25.

Property moves on its own clock

Real estate spikes in January and February, peaking in January, which reflects the resurgence of when people start house-hunting after Christmas.

Not everyone is seasonal, yet

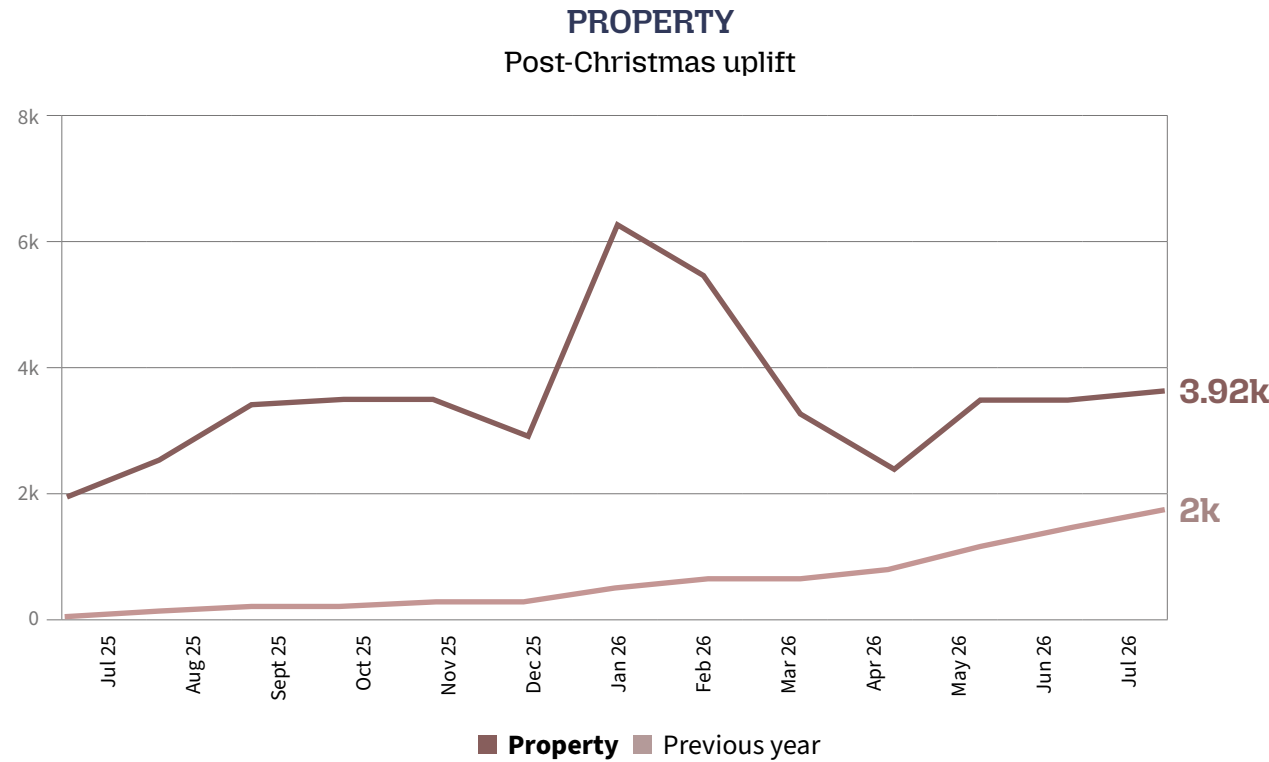
Legal barely moved all year, and sports and leisure were steadier than most, though not flat, with peaks in November and again in July.

Why it matters

AI search optimisation now has a calendar, and it isn't the same for everyone, with search activity peaking at different times:

- Fashion in spring
- DIY in high summer
- Jewellery and gifts before Christmas
- Property in January

Plan AI visibility the way you'd plan a paid search or retail media budget around your peaks, not evenly across the year.



Previous year compares the corresponding months from July 24–July 25.

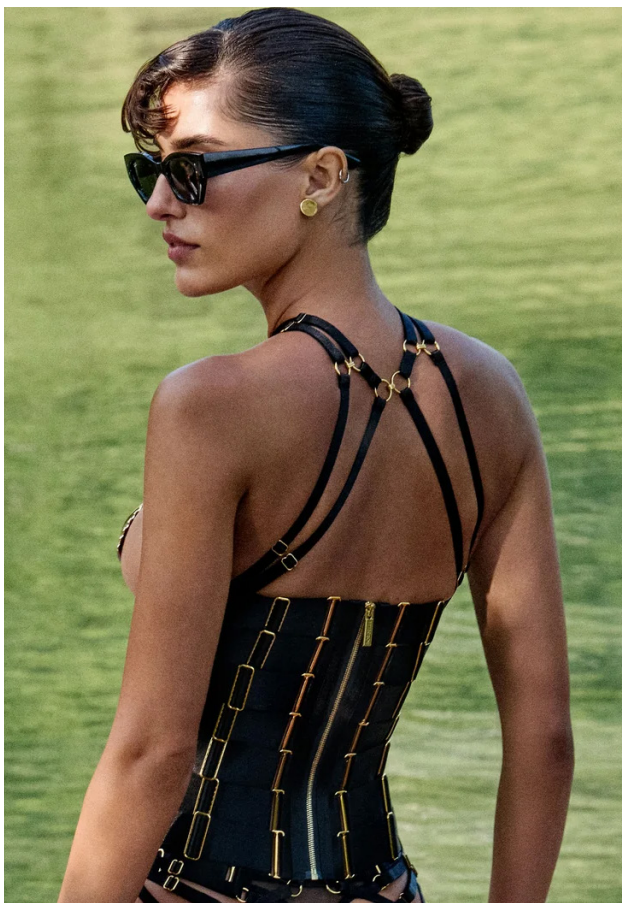
BORDELLE

Capturing high-intent discovery moments

For premium fashion brands, visibility matters most at the point where shoppers are actively researching. When paid media options are limited, organic visibility and content depth become even more important because customers still need trusted routes into the brand.

Done well, this can have significant commercial impact. For Bordelle, the approach supported:

- a **3,000% increase in organic visibility**,
- alongside **37% growth in EU markets**, and
- **31% revenue growth**.



LUXURY TRAVEL CASE STUDY

NORTHROP & JOHNSON

Staying visible during high-value planning moments

For luxury travel brands, visibility matters most when prospective customers are actively researching high-value purchases and experiences. For US superyacht brokerage Northrop & Johnson, rising competition and changing search behaviours meant the challenge was to be present across moments that influence sales and charter decisions.

A combined SEO and PPC approach helped strengthen visibility across those journeys. This supported demand during peak planning and booking periods, contributing to:

- a **72% reduction in cost per acquisition**
- **30% increase in site visibility**, and
- **264% increase year on year** in LLM-engaged sessions.



SECTOR SEASONALITY HEATMAP
AI search sessions



Each sector is shaded against its own peak.

Sector	Jul 25	Aug 25	Sep 25	Oct 25	Nov 25	Dec 25	Jan 26	Feb 26	Mar 26	Apr 26	May 26	Jun 26	Jul 26
Automobile													
Finance													
FMCG													
Gambling													
Insurance													
Legal													
Pharmaceuticals													
Professional services													
Real estate													
Retail – Beauty													
Retail – Consumer goods													
Retail – Entertainment													
Retail – Fashion													
Retail – Gifts													
Retail – Jewellery													
Retail – Home/Garden													
Retail – Sports													
Retail – Trade/DIY													
Travel													
SaaS													

Retail-led advice



Retailers need to move beyond product promotion and embed content throughout the journey that answers specific, need-led decisions. This means shifting from ‘here’s what we sell’ to ‘here’s what’s right for you, and why.’

Fashion retailers, particularly in the premium and luxury space, should help guide customers through a more considered purchase: what products are right for the occasion, fit, and personal style.

Health and beauty retailers should anchor content around routines, conditions and outcomes. Consumers are often solving concerns, such as acne, ageing and sensitivity, and content should reflect this while also addressing safety, compatibility and effectiveness to build trust and authority.

The goal is to become the source that helps users decide, because LLMs are far more likely to surface brands that guide choices, not just list products.

Helen Green
SEO and GEO technical expert, IDHL

Expert advice: Five ways brands can show up on Reddit and be surfaced

In the new search era, real opinions from real people carry more weight than ever. Last year alone, users chose a [Reddit result 23 billion times](#) within Google searches, actively seeking answers that cut through low-quality content.

28% of Redditors are **not on Facebook**

36% of Redditors are **not on Instagram**

38% of Redditors are **not on TikTok**

53% of Redditors are **not on Twitter/X**

61% of Redditors are **not on Pinterest**

73% of Redditors are **not on Discord**

75% of Redditors are **not on LinkedIn**

75% of Redditors are **not on Snapchat**

Sandra Matija, Senior Paid Social expert, advises how brands can show up on Reddit and be surfaced

01 Use sub-Reddit conversations to identify common questions

Monitor discussions to understand what your audience is asking and where information gaps exist.

02 Create content that directly addresses those themes

Develop useful, expert-led content that answers real user questions rather than relying solely on brand messaging.

03 Target relevant communities, not just broad audiences

Monitor discussions to understand what your audience is asking and where information gaps exist.

04 Add value to the conversation instead of interrupting it

Monitor discussions to understand what your audience is asking and where information gaps exist.

05 Build trust through authentic engagement

Monitor discussions to understand what your audience is asking and where information gaps exist.

One engine dominates, but the field is widening

AI search is a fast-splintering ecosystem of assistants, and the data shows a clear leader with a pack of challengers growing even faster behind it.

ChatGPT is the engine room

It drove 1.37 million engaged sessions over the 13-month period – roughly 91% of all AI search activity (up +402% year on year).

For now, being visible in AI search means, overwhelmingly, being visible in ChatGPT.

ChatGPT

1.37 million sessions +402%

But the challengers are scaling faster than the leader.

The steepest growth curve belongs to the newcomers

YOY GROWTH IN ENGAGED SESSIONS

Claude

13,261 sessions  +1,182%

Gemini

42,610 sessions  +404%

Copilot

29,776 sessions  +313%

Perplexity

35,963 sessions  +114%

The one to look out for...

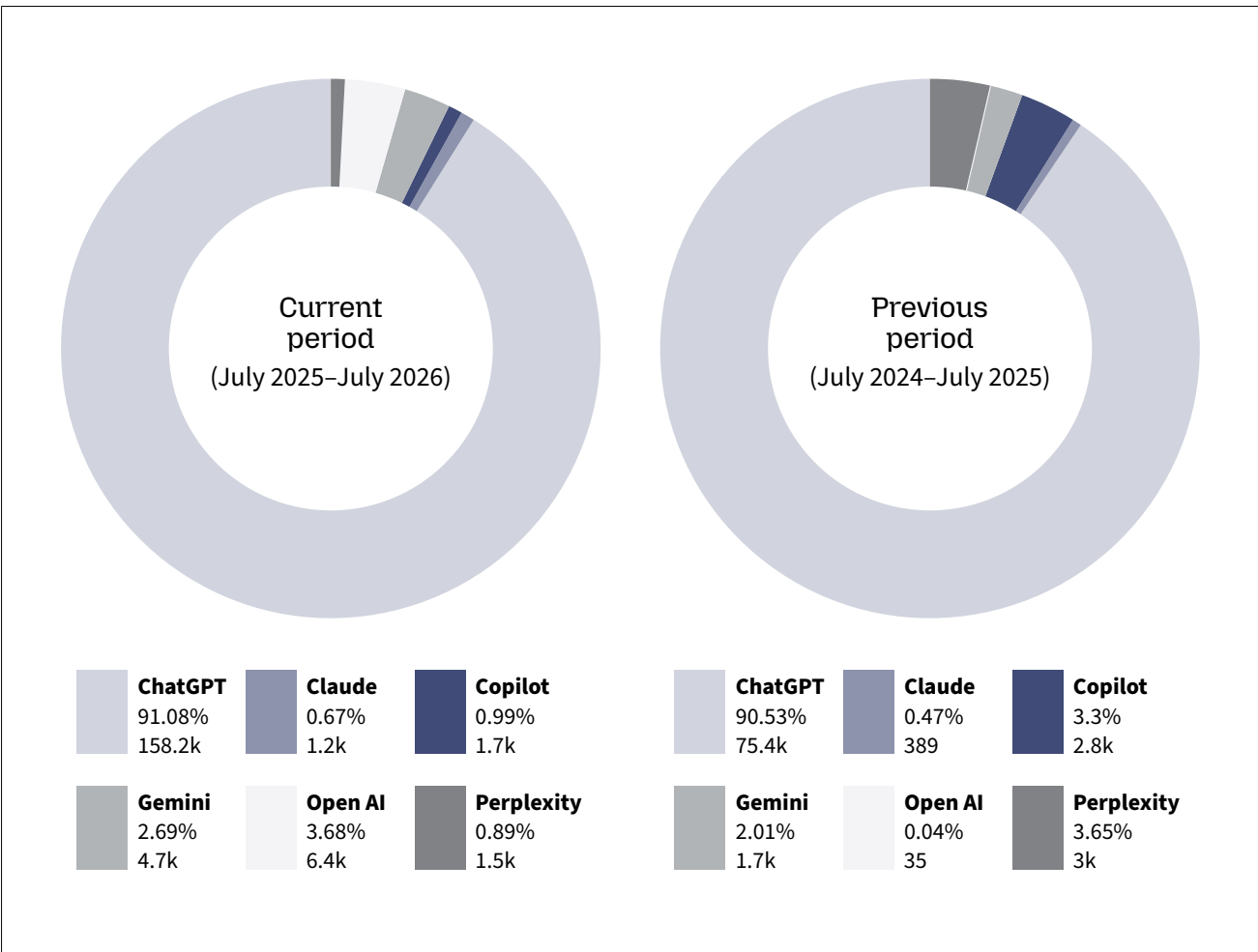


Copilot is the one to watch for workplace search. It is Microsoft-backed and already built into tools people use every day, from Word and Outlook to PowerPoint and Excel. ChatGPT may dominate now, but Copilot has a clear route into daily professional behaviour.

Chris Shelbourn

Organic Delivery Director, IDHL

LLM TRAFFIC SHARE BY PLATFORM



Why it matters

ChatGPT is the clear starting point for any AI search strategy, but the wider field is moving. Gemini, Copilot and Claude are all gaining ground, which means brands cannot afford to build visibility around one platform alone. The market is still taking shape, and the brands that spread their focus now will be better placed as user behaviour shifts.

UK growth, US maturity – what the data shows

Two markets, two different journeys

The UK and US are both climbing the AI search curve, but they are not moving at quite the same speed, or from the same starting point.

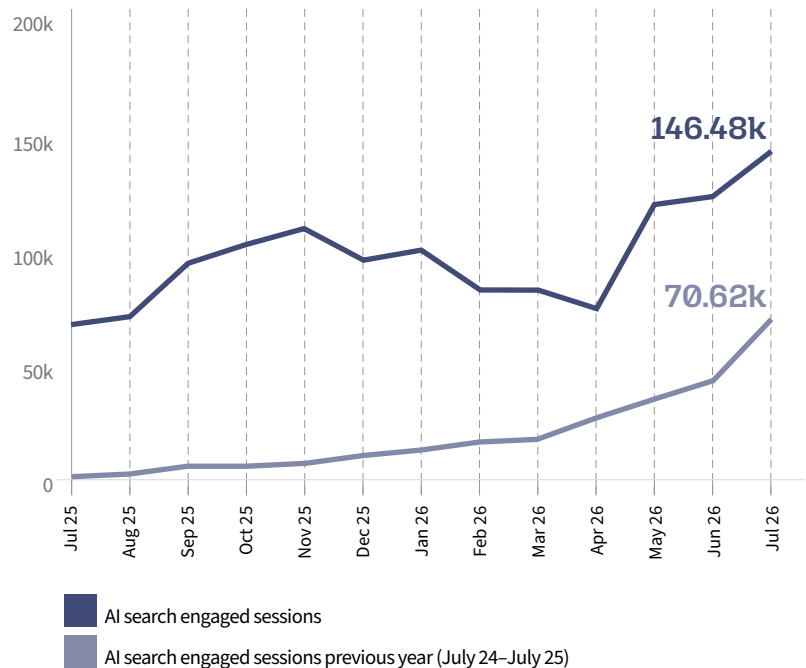
The UK is showing the sharper acceleration, with engaged sessions up 413% year on year, compared with 302% in the US. But the US appears to be further along the adoption curve, with faster consumer uptake giving it a higher base to grow from.

That higher starting point naturally makes the percentage growth look less dramatic, even while overall AI search activity continues to rise. In other words, the UK may be sprinting, but the US is already a few steps further down the track.

This also points to a wider shift in maturity. As usage increases, referral traffic is starting to behave more like other search channels, with growth patterns shaped by seasonality, market maturity and wider channel mix.

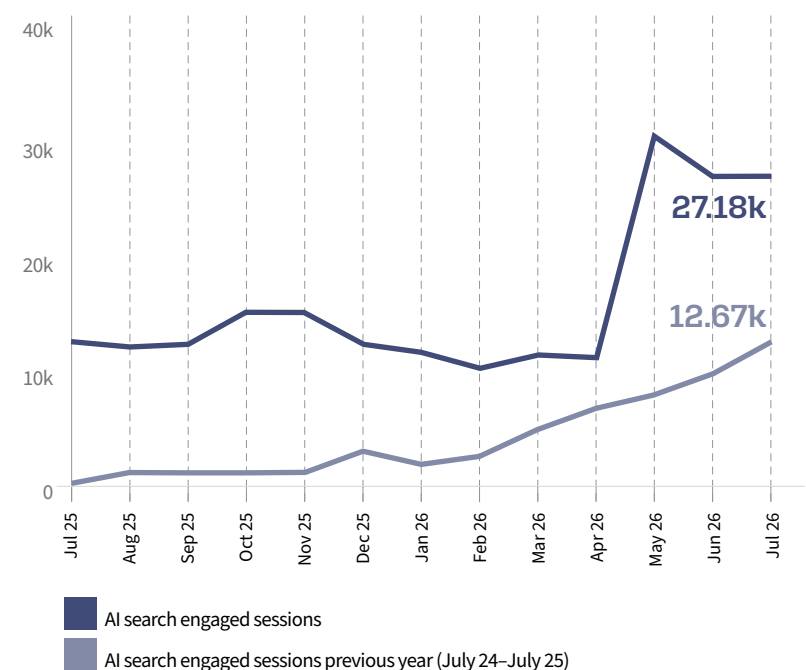
UK

All clients AI search engaged sessions



US

All clients AI search engaged sessions



Peaking both sides of the Atlantic

The biggest similarity is timing.

Both markets jumped in May 2026 and have held those higher levels since. AI search demand isn't drifting up gradually... it stepped up, and up in both countries at the same time.

What's happened since is where they differ.

The UK hasn't peaked yet as engaged sessions climbed to 146,480 in July, a third consecutive record month and 107% up on the same month last year.

The US spiked harder and faster, jumping in May before settling into a plateau around June and July, still 115% ahead year on year.

Part of this uplift is likely linked to changes in ChatGPT's results, with more clickable links appearing from May onwards. More visible links create more opportunities for referral traffic, but only for brands that are already visible within those AI-generated responses.

UK

Faster growth, bigger sample

+413%
engaged sessions year on year

1.45m
sessions reviewed

+107%
last month

US

Smaller sample, more mature behaviour

+302%
engaged sessions year on year

214k
sessions reviewed

+115%
last month



Our data suggests that US users are slightly further ahead in adopting AI search, likely because the market has had earlier access to new models and greater familiarity with these tools since the launch of ChatGPT.

For UK brands, the US offers a useful indication of where behaviour may be heading next, but strategy still needs to reflect the maturity, sector and channel mix of each market.

Sam Ogrizovic

US Managing Director, IDHL

What brands should do now

AI search is very much here, and here to stay, but it is not yet a replacement for traditional search. For most brands, LLM-driven traffic still represents a small share of total visits, but the growth is now tangible enough to warrant proper tracking, investment and strategic attention.

Track AI traffic properly

- Monitor LLM referrals by platform, market and sector.
- Benchmark sessions, revenue, transactions and conversion quality.
- Track whether AI users are driving higher volume, lower value, or stronger intent.

Audit how AI tools see your brand

- Test priority prompts across ChatGPT, Gemini, Copilot, Claude and Perplexity.
- Check whether your brand is mentioned, cited, linked to and described accurately.
- Identify competitor visibility, missing sources and content gaps.

Create content that helps people decide

- Move beyond product-led content and answer real decision-stage questions.
- Cover comparisons, suitability, trust, pricing, use cases and 'best for me' queries.
- Make content clear, useful and easy for AI tools to interpret.

Plan AI visibility around seasonality

- AI search is already mirroring demand peaks in retail, travel, beauty and property.
- Build content, PR and technical foundations before seasonal spikes hit.
- Use AI search data to shape the Golden Quarter, Boxing Day, January and spring planning.

Build authority beyond their website

- LLMs look for repeated signals across trusted external sources.
- Strengthen presence across media, reviews, forums, social, Reddit and third-party sites.
- Use PR and content to reinforce the same brand narrative everywhere.

Optimise for more than ChatGPT

- ChatGPT dominates now, but Gemini, Copilot and Claude are growing fast.
- Match platforms to customer behaviour: consumer search, workplace search or research-led discovery.
- Avoid building an AI search strategy around one model alone.

Adapt by market, sector and maturity

- The UK is growing faster, while the US appears further along the adoption curve.
- Build strategies around local maturity, customer behaviour and sector competition.
- Do not apply one global AI search playbook across every market.

Keep AI search connected to organic

- GEO should not sit in a silo away from SEO.
- Technical SEO, content, PR, analytics and user experience all influence AI visibility.
- Make AI search part of the wider organic visibility strategy.

Meet the experts

This report was made possible with insight from experts at digital marketing agency IDHL, who work closely with clients across SEO, GEO, paid media, content, PR, and data.

Here's an overview of who they are



CHRIS SHELBOURN
Organic Search
Delivery Director

With 17 years' experience in SEO, Chris helps brands navigate the shift from traditional search to AI-driven discovery through technical SEO, GEO and digital experience optimisation.



HELEN GREEN
Organic Search
Account Director

Helen leads SEO strategy for global ecommerce brands, bringing an end-to-end perspective on organic search with a focus on how websites are understood, trusted and surfaced across both traditional and AI-powered search.



CLAIRE TAYLOR
Managing Director –
Web Division

Leading more than 120 specialists, Claire drives the strategy and direction of the Web Division, helping shape how organisations optimise their digital experiences for both human users and AI systems.



TOM WALKDEN
Media Strategy Director

With more than 15 years' experience across audience-led media strategy, Tom leads a team of 20, helping brands understand how evolving media behaviours, AI and emerging platforms are changing the way audiences discover and engage with content.



SAM OGRIZOVIC
US Managing Director

Based in New York, Sam oversees IDHL's US division, helping brands across sectors including construction, luxury travel and retail understand how AI is reshaping search, online visibility and customer journeys.



CHERYL CROSSLEY
Head of PR

With 17 years' experience in PR, Cheryl leads a team of 12, helping up to 30 brands each month build authority, visibility and trust through data-led storytelling, earned media and digital PR across sectors including travel, retail, finance & business services.



SANDRA MATIJA
Senior Paid Social Expert

Sandra helps global brands reach highly engaged audiences through social platforms and online communities, with a focus on how consumer conversations influence search, discovery and trust in the AI era.



iDHL

A little bit about IDHL

IDHL is a digital performance agency, bringing together expertise across performance marketing, web commerce data and creative.

Partnering with leading retail brands, as well as businesses across travel, finance, professional services and B2B, IDHL helps organisations improve how they are found, understood and chosen online.

With more than 500 digital specialists across the UK and US, and offices in London, Leeds, Manchester, Southampton and New York, IDHL is built on 25 years of digital innovation.

For more information visit
www.idhlagency.com

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