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Fewer Steps in the Shopper Journey:

What Shapes the Shortlist?



How shopper journeys are changing across AI, search, social and retail, and what it means for your brand.



Food & Beverage, Beauty, Household Goods and Apparel
Q3 2025 vs Q3 2026

Contents



This report examines how interaction patterns differ across categories, stages and channels, helping identify where to investigate before changing priorities.

Introduction

03 Key findings

04 Where the journey is getting shorter

The broad changes

05 Retail and AI take a bigger share of the journey

06 Research accounts for most of the lost interactions

07 Apparel follows a different pattern

08 Most Research interactions happen off retail sites

09 Social holds up better, especially in Apparel

A closer look at Google

10 Where Google sends shoppers next

11 Journeys with Google AI have fewer interactions

What this means

12 What this means for your brand

Key findings

Food & Beverage, Beauty, Household Goods and Apparel, Q3 2025 vs Q3 2026

Page 06

6.18 to 5.21

interactions per journey

Average interactions per journey fell in every category.

Page 06

~27%

fewer Research-stage interactions

Product investigation and comparison account for most of the decline in interactions.

Page 05

2.5x

standalone AI's share of interactions

Retail and standalone AI account for a larger share of shopping interactions, while search and community platforms account for less.

Page 07

~14%

fewer Research interactions in Apparel

Research interactions fall by about 30% in three categories. The decline in Apparel is roughly half as large.

Page 08

74–85%

of Research happens off retail sites

Retail takes a larger share overall, yet most product investigation and comparison still happens outside retail destinations.

Page 11

28%

of journeys included Google AI

Exposed journeys have fewer interactions than journeys with no AI exposure: 4.4 against 5.5.

Source: Datacy Category LLM | Sample: 12 million shopper interactions among U.S. adults, four categories | Timeframe: Q3 2025 vs Q3 2026

Where the journey is getting shorter

A closer look at what is changing between discovering a product and deciding to buy.

Before buying, a shopper might read a Reddit discussion, watch a TikTok review, check a brand page or compare retailer listings. Each can help answer a different question.

Google AI Overviews and other AI tools can bring information from several sources into one answer. Fewer separate visits can still involve substantial comparison, validation and consideration.

For brands, the question is where their products enter that consideration, what helps shoppers feel confident and what happens next. This report examines how interaction patterns differ across categories, stages and channels, helping identify where to investigate before changing priorities.

Datacy compared Food & Beverage, Beauty, Household Goods and Apparel journeys in Q3 2025 and Q3 2026. The broad changes come first, followed by a closer look at Google as one example within the wider story.

12M
shopper interactions

~2M
journeys

4
categories

1.5M
interactions per category, per quarter

About the analysis



The analysis compares **12 million shopper interactions** across **approximately 2 million journeys** among U.S. adults in Q3 2025 and Q3 2026, with **1.5 million interactions per category** in each quarter.

An interaction is an observable action, such as a search, content view, AI prompt, product-page visit or purchase-related action.

A shopper journey connects observed, category-relevant actions across Discovery, Research and Decision, beginning with the first observed touchpoint. Datacy's journey framework includes paths that lead to purchase and paths where the shopper stops pursuing the original need or intent. Research is where shoppers investigate and compare options.

Category-intelligent models connect observed behavior, classify stages and identify decision cues. Findings undergo validation and human review.

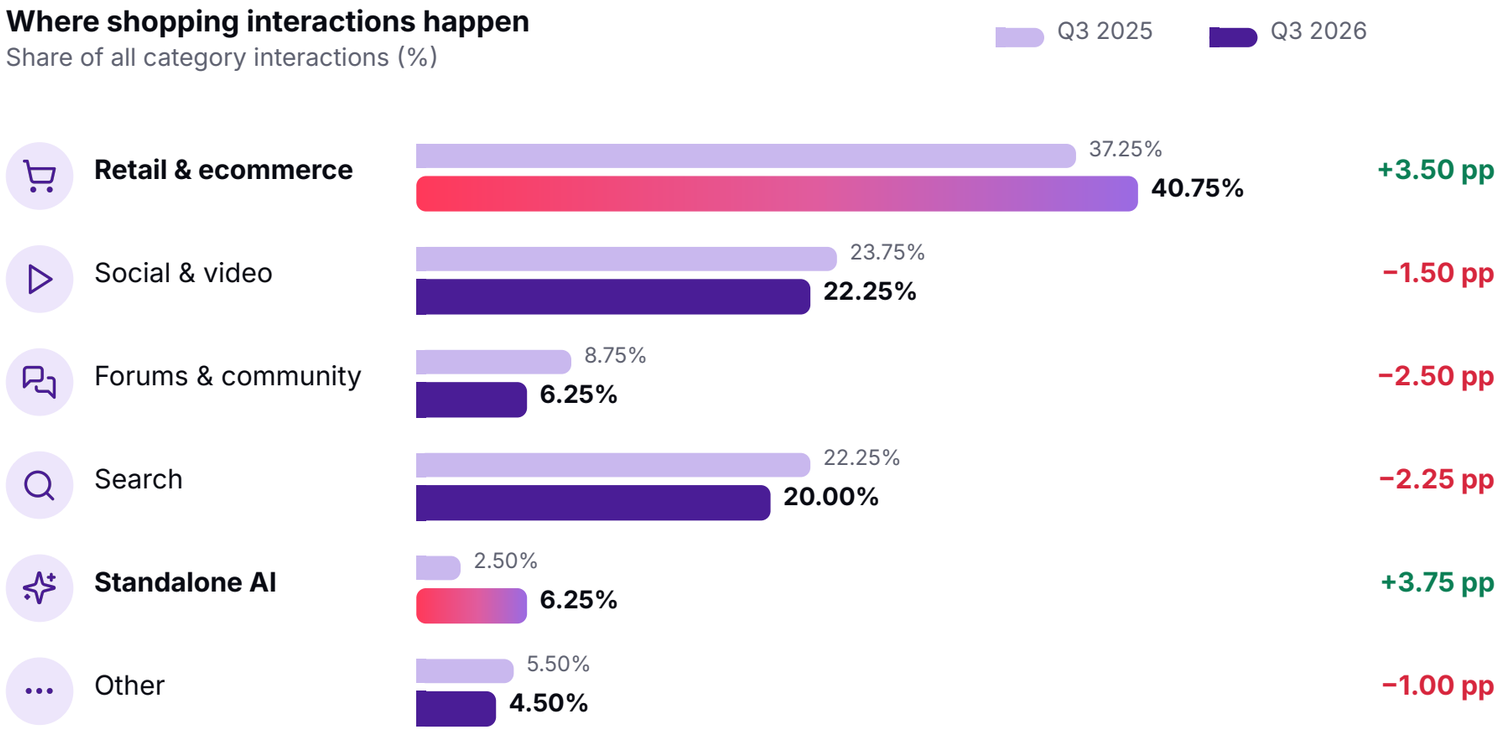
Journey counts are approximate, derived from interaction totals and average interactions per journey.

Reading the charts: interactions are shopping activities, not elapsed time. Channel shares describe the sample, not total market traffic, and do not measure channel effectiveness. Platform examples are illustrative. AI exposure comparisons show association, not proof of cause. Values are rounded, so stage values and totals may not reconcile exactly, and percentage declines calculated from them are approximate.

Retail and AI take a bigger share of the journey

Retail and standalone AI tools account for more of the interactions in the four-category sample.

Where shopping interactions happen
Share of all category interactions (%)



2.5x

Standalone AI's share of shopping interactions
2.50% to 6.25%

+3.50 pp

Retail & ecommerce share
37.25% to 40.75%

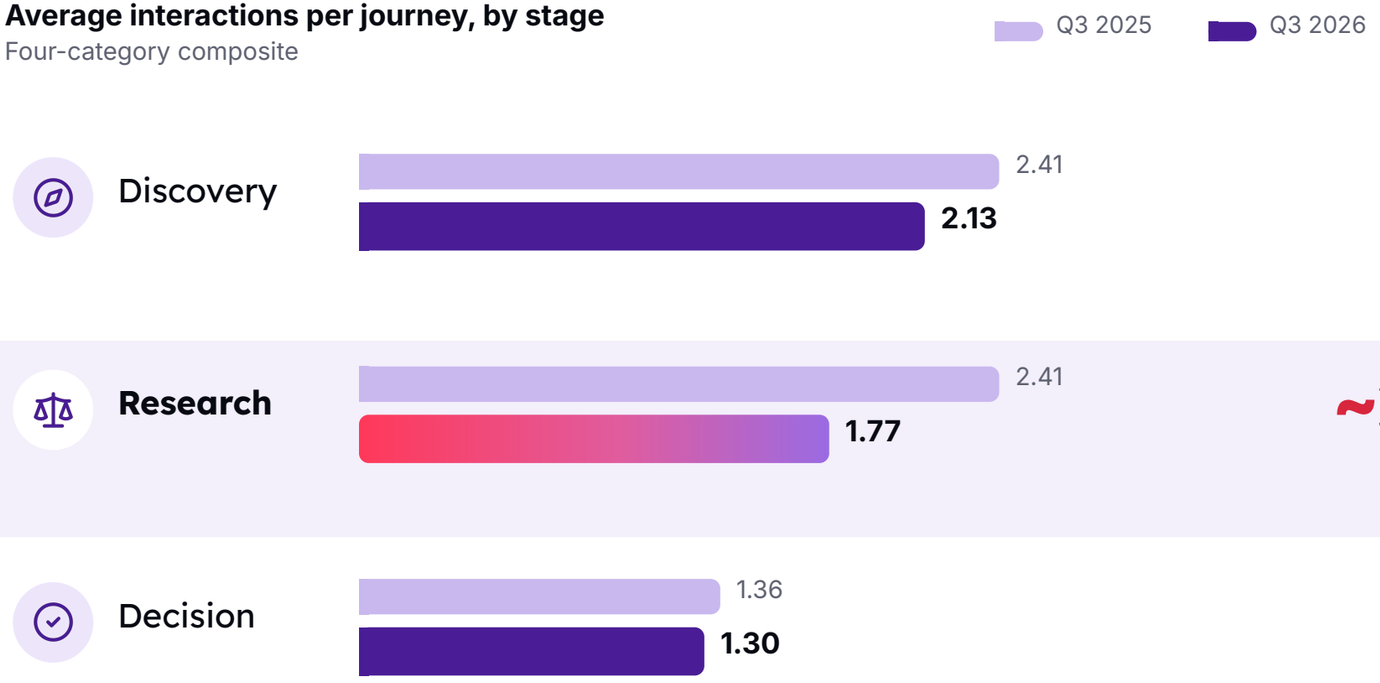
Retail and standalone AI account for a larger share of shopping interactions, while search and community platforms account for less. The changing mix raises a question for brands: which questions are shoppers bringing to each encounter?

pp = percentage points
Source: Datacy Category LLM | Sample: Food & Beverage, Beauty, Household Goods and Apparel | Timeframe: Q3 2025 vs Q3 2026

Research accounts for most of the lost interactions

Research is the stage when shoppers investigate products and compare options, wherever they do it.

Average interactions per journey, by stage
Four-category composite



6.18 to 5.21

total interactions per journey, Q3 2025 to Q3 2026

~27%
fewer



Product investigation and comparison account for most of the decline in interactions. AI can bring several sources into one encounter, allowing shoppers to gather information without making as many separate visits. Brands need to understand which questions and which product information surface there.

Source: Datacy Category LLM; Consumer Goods AI Search Impact, Q3 2026 v2, slides 4–6 | Sample: four-category composite; Research: 2.41 to 1.77, approximately 27% fewer interactions | Timeframe: Q3 2025 vs Q3 2026

Apparel follows a different pattern

Research interactions fall by about 30% in three categories. The decline in Apparel is roughly half as large.

Average Research-stage interactions per journey
Same 0–3 scale in every panel

Q3 2025 Q3 2026

Food & Beverage ~30% fewer

2.20
1.54

0.66 fewer interactions per journey

Beauty ~29% fewer

2.58
1.82

0.76 fewer interactions per journey

Household Goods ~30% fewer

2.86
2.00

0.86 fewer interactions per journey

Apparel ~14% fewer

2.07
1.77

0.30 fewer interactions per journey



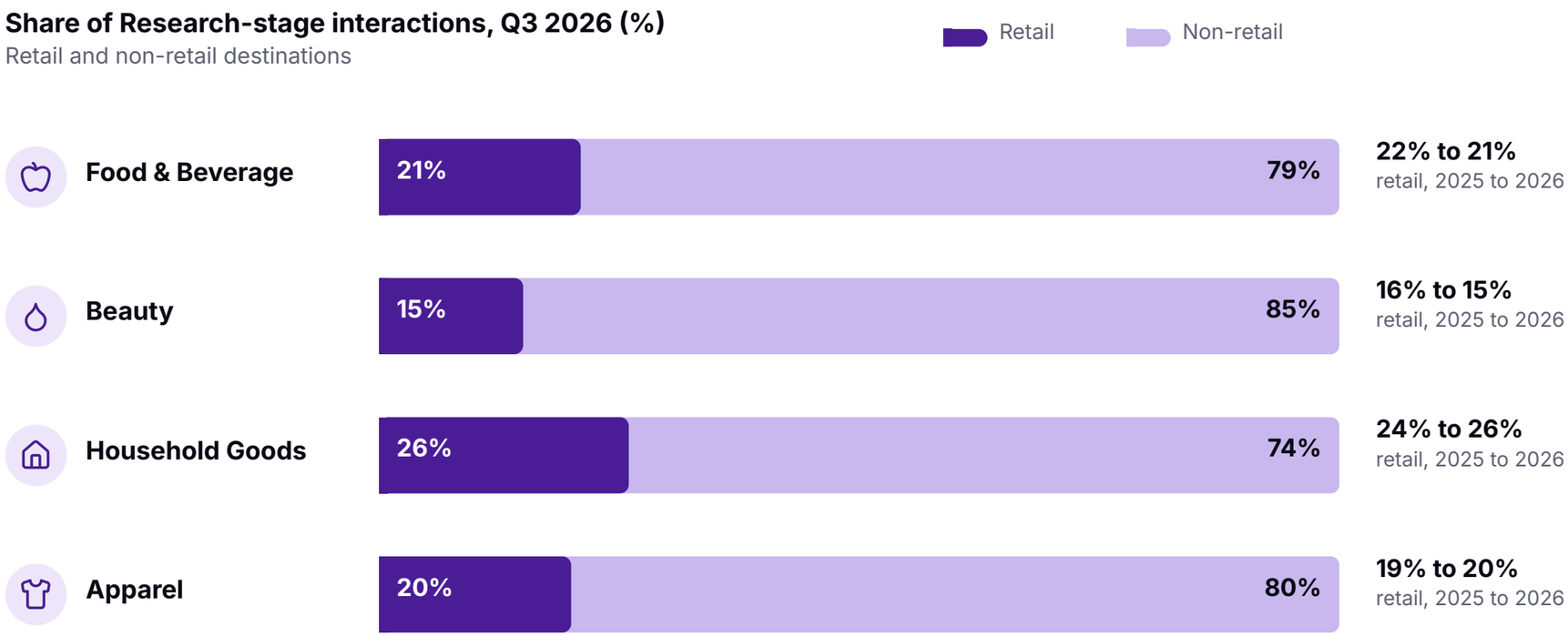
The shift is uneven. Apparel shoppers retain more of their Research-stage interactions than shoppers in the other three categories. How much comparison happens across separate encounters remains a category-specific question.

Source: Datacy Category LLM; Consumer Goods AI Search Impact, Q3 2026 v2, slide 5 | Sample: Research-stage interactions only, by category | Timeframe: Q3 2025 vs Q3 2026

Most Research interactions happen off retail sites

Across the four categories, 74–85% of Research interactions happen outside retail destinations in Q3 2026.

Share of Research-stage interactions, Q3 2026 (%)
Retail and non-retail destinations



74–85%

of Research interactions happen outside retail destinations, depending on the category

Retail takes a larger share of shopping interactions overall, yet most product investigation and comparison still happens outside retail destinations. Understanding what shoppers bring to a listing matters alongside understanding what they do once they arrive.

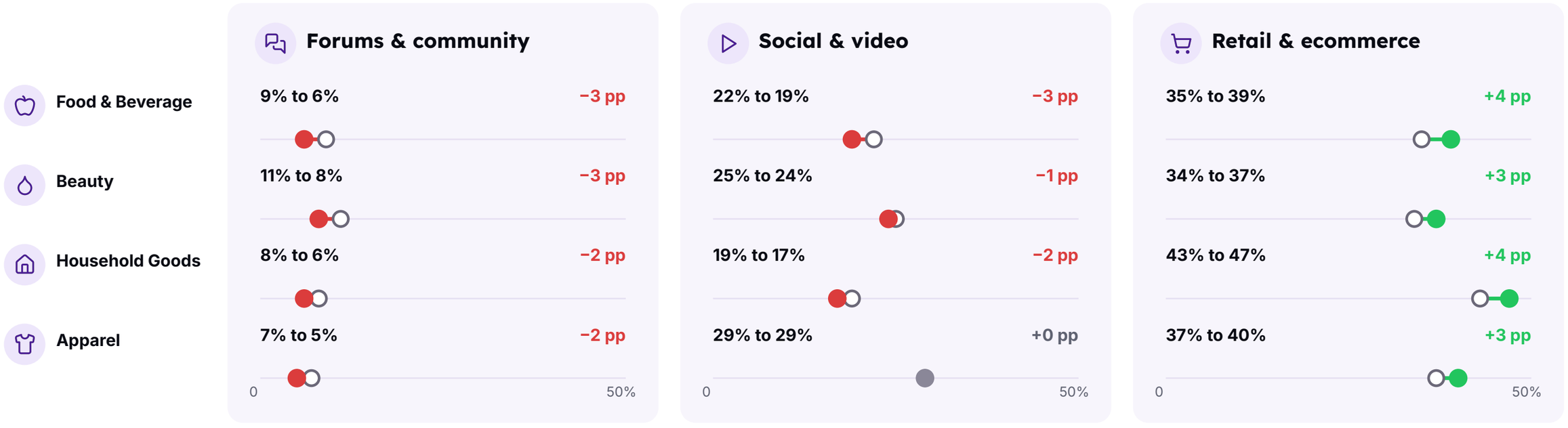
Non-retail = 100% minus retail
Source: Datacy Category LLM; Consumer Goods AI Search Impact, Q3 2026 v2, slide 7 | Sample: all Research-stage interactions within each category | Timeframe: Q3 2026, with Q3 2025 retail share for comparison

Social holds up better, especially in Apparel

Social and video keep a 29% share in Apparel and slip only slightly in Beauty. Forums lose share in every category.

Share of all category interactions (%)
Each panel on the same 0–50% scale

Q3 2025 · Q3 2026, up · Q3 2026, down · No change

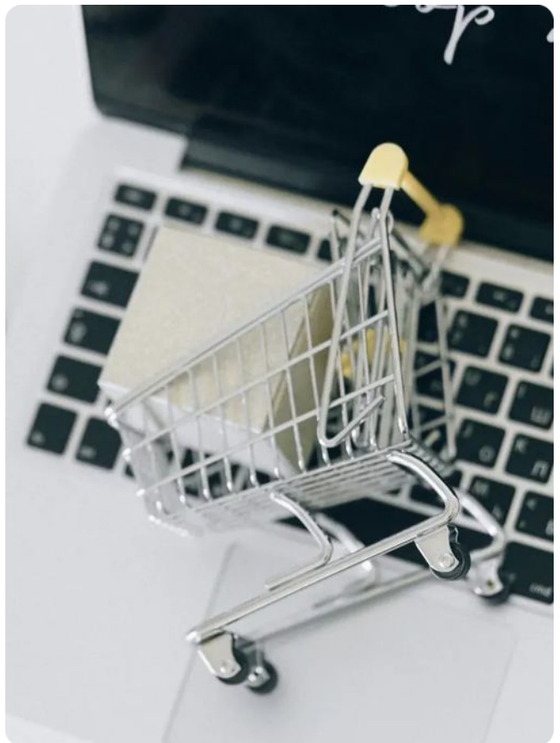


Social and video retain their share in Apparel and lose relatively little ground in Beauty, while community platforms lose share across all four categories. These channels are following different paths, and fewer direct community interactions do not tell us how often their content informs an AI answer.

pp = percentage points
Source: Datacy Category LLM; Consumer Goods AI Search Impact, Q3 2026 v2, slides 9–11 | Sample: fixed interaction sample within each category | Timeframe: Q3 2025 vs Q3 2026

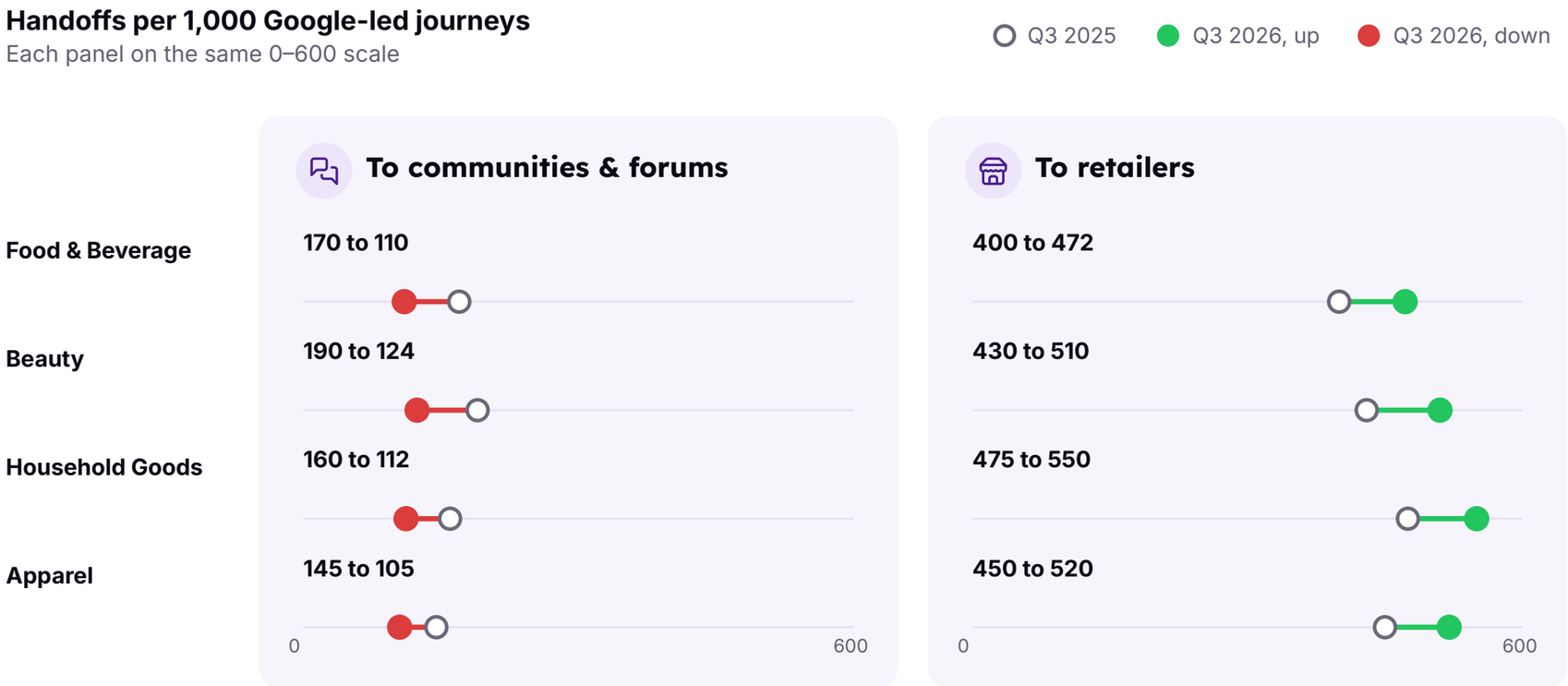
Where Google sends shoppers next

Google is one view into the wider shift. These rates cover all Google-led journeys, including those without AI exposure.



Handoffs per 1,000 Google-led journeys
Each panel on the same 0–600 scale

Q3 2025 · Q3 2026, up · Q3 2026, down



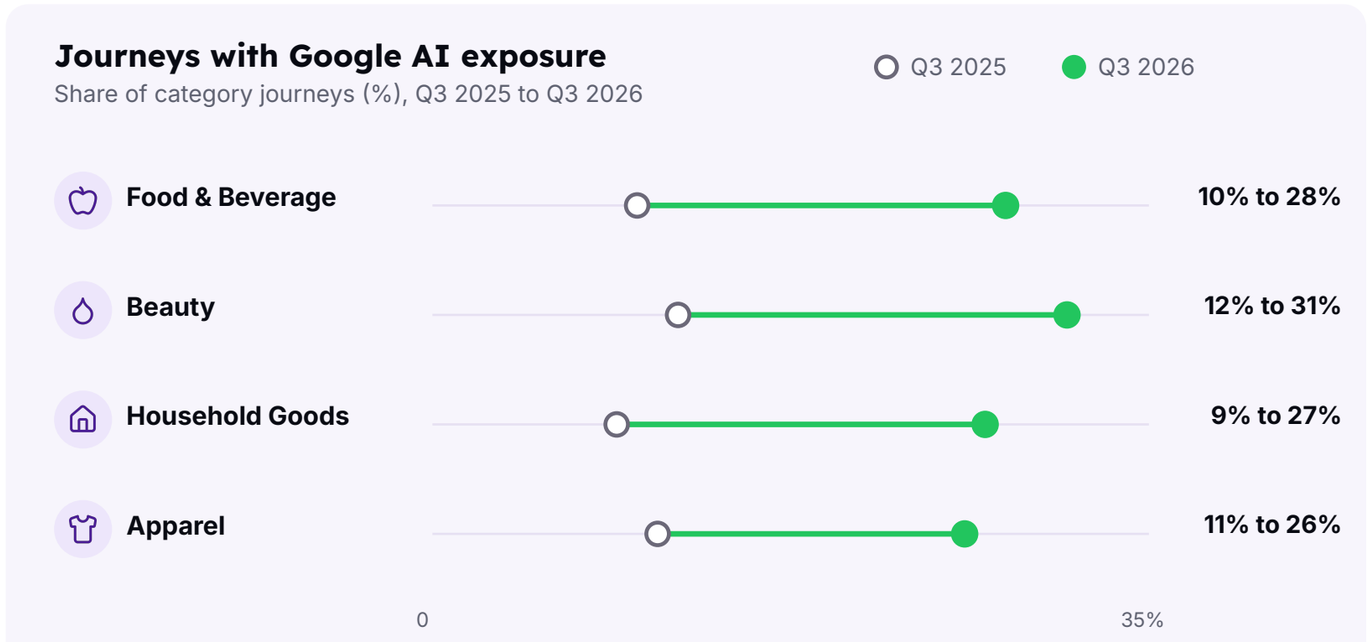
Across all four categories, Google-led journeys produce more retailer handoffs and fewer community handoffs. What shoppers encounter at the retailer deserves attention, along with the information they gathered before getting there.

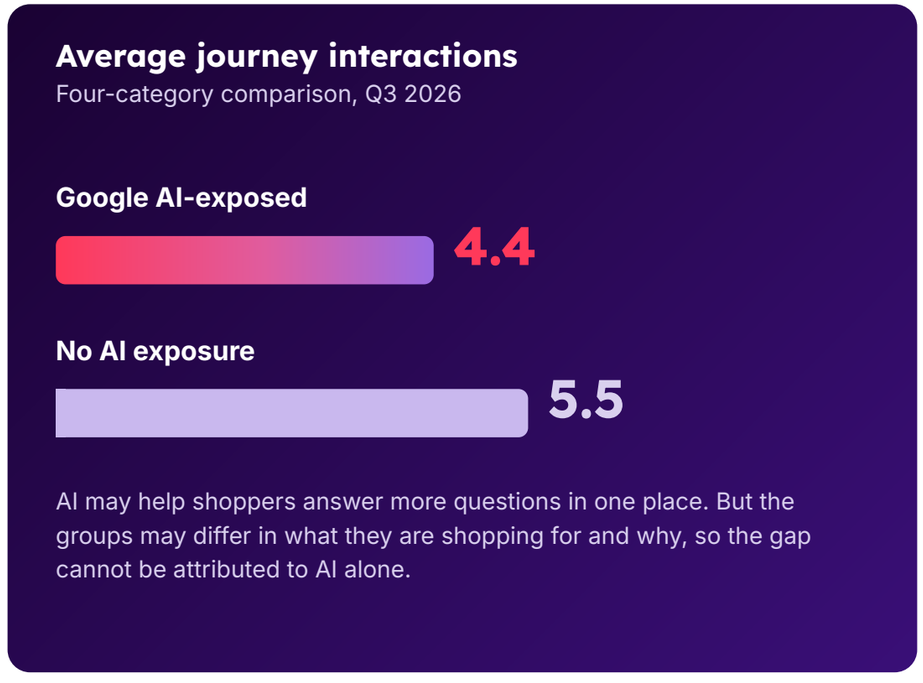
Handoff rate = handoffs per 1,000 Google-led journeys within each category; destinations are not mutually exclusive, so the two panels are not parts of a whole
Source: Datacy Category LLM; Consumer Goods AI Search Impact, Q3 2026 v2, slide 21 | Sample: all Google-led journeys, including those without AI exposure | Timeframe: Q3 2025 vs Q3 2026

Journeys with Google AI have fewer interactions

Google AI exposure rises across all four categories. This comparison covers Google AI specifically, not every AI tool.

Reading the AI measures: Page 5 shows standalone AI's share of shopping interactions. Here, Google AI exposure shows the share of journeys that included Google AI. The percentages use different bases and aren't directly comparable.





Google AI exposure is becoming more common, and exposed journeys have fewer interactions than journeys with no AI exposure. Prompt-level visibility helps brands examine what shoppers ask, how products appear in the answers and what shoppers do afterward.

Google AI exposure = a separate journey flag; the comparison group has no AI exposure
Source: Datacy Category LLM; Consumer Goods AI Search Impact, Q3 2026 v2, slides 12, 22 and 24 | Sample: four categories; Google AI specifically, not every AI tool | Timeframe: Q3 2025 vs Q3 2026

What this means for your brand



The category patterns identify where to look more closely. Answering these questions for your brand requires examining the content and connected behavior behind them.

01

Where are you earning consideration?

Examine the needs, questions and comparisons associated with shoppers encountering your products and considering alternatives.

02

What helps shoppers feel confident?

Look at the claims, demonstrations, reviews and product details shoppers seek as they weigh their options.

03

What happens next?

Connect AI exposure and other encounters with subsequent observed behavior: further research, retailer visits, switching or drop-off.

Source: Datacy Category LLM; Consumer Goods AI Search Impact, Q3 2026 v2, slides 5–7, 9–12, 19, 21–22 | Sample: four-category sample; Google is a specific case within that analysis, not a measure of the effect of all AI tools | Timeframe: Q3 2025 vs Q3 2026

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Where is your brand earning or losing consideration?

Partner with Datacy to understand what shoppers ask AI, how your brand appears and what they do next. Translate that evidence into clear priorities for AI visibility, content, media and retail.

Bring us your category and the decision you need to make. We'll discuss how Datacy can help identify where shoppers need more confidence and which opportunities to investigate first.

Request a meeting at datacy.com

Discuss your category with Datacy

Let's talk

Connected journey decision intelligence

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