



Directions Boston 2026

When Consumers Lead:

AI, Autonomous Discovery, and the Rewiring of the Digital Economy

Sandra Ng, Tom Mainelli and Greg Ireland

IDC Global Devices, Consumers & Imaging Domain

April 8th, 2026

AI consumer archetypes are emerging



AI Navigators

- **97%** Knowledge Users



AI Assistants

- **86%** Life Optimizer Users
- **84%** Productivity Users



AI Creators

- **73%** Creativity Users



AI Decisions Makers

- **81%** Shopping Users
- **67%** Career & Educations Users
- **66%** Emotional Support Users



AI is embedded in consumer behavior



46% are daily users



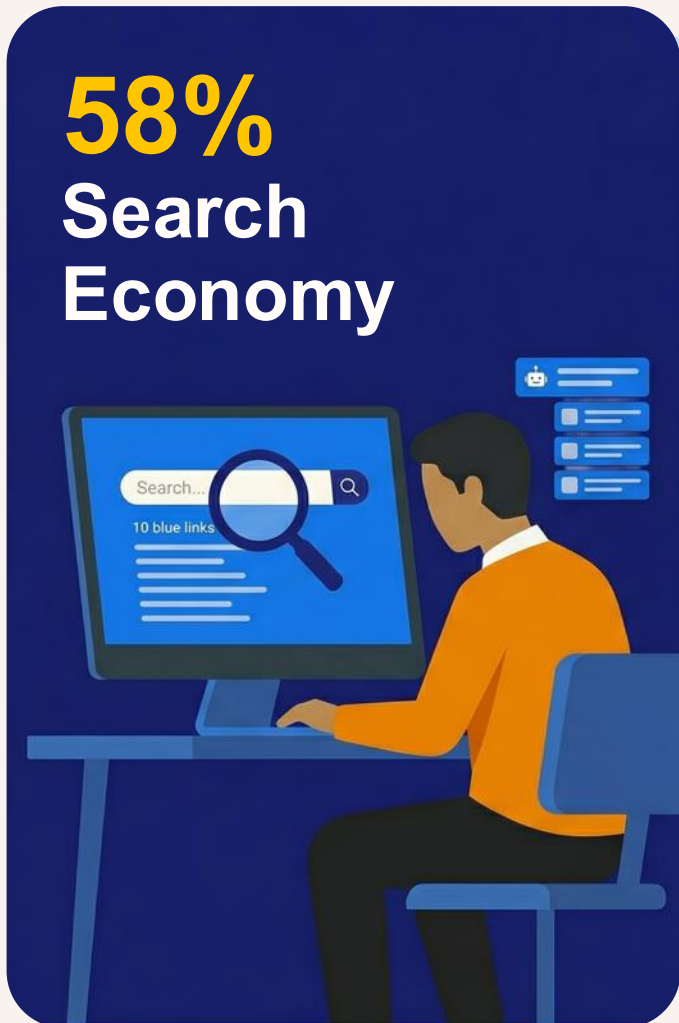
88% have a positive view of AI



87% use AI in at least part of their purchase decisions



SEO, AEO and GEO



58%
Search Economy

Primary Interface
Device + Browser + Search Engine

Consumer Behavior
Search to Browser to Compare

Discovery Model
Open and Link-based

Control Point
Search Rankings

Results
Many Options



63%
AI Discovery Economy

Primary Interface
Device + AI Assistant

Consumer Behavior
Ask to Receive to Decide

Discovery Model
Curated and Answer-based

Control Point
AI Platforms

Results
Few Recommendations

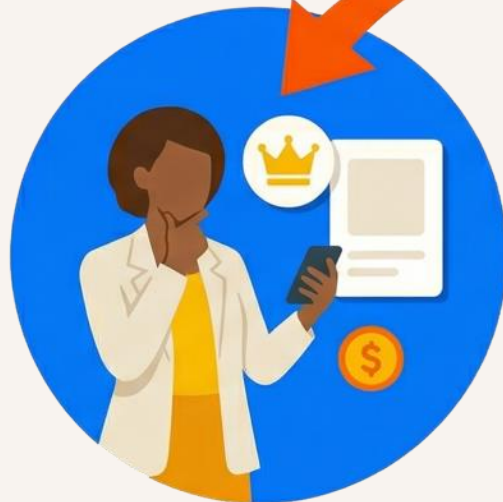


AI is increasingly becoming the gatekeeper

63% of consumers now start their journey with AI when researching products or services



AI is shaping purchase decisions through **price comparisons, reviews, product recommendations, and brand research**



71% of consumers say it will be useful for brands to pay to promote products and services in AI assistants (i.e. sponsored prompt response)

IF YOUR BRAND ISN'T SURFACED BY AI, IT'S EXCLUDED FROM THE DECISION



Shape what AI says about your brand/product

Turn AI visibility into a measurable, controllable advantage

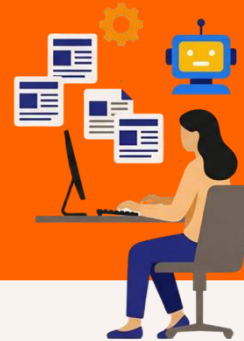
Create Content
AI Can Rely On



Shape Your
Market
Narrative



Be Represented
in Trusted
Sources



Two IDC report covers are shown. The top cover is titled "Is It Time to Upgrade Your Smartphone in 2026?" and is sponsored by SPOTLIGHT. It features a blue header with the IDC logo and a light blue background with a circuit pattern. The bottom cover is titled "Smartphone Upgrade Evaluation Guide 2026" and is a Technology Assessment Guide. It features a blue header with the IDC logo and a light blue background with a circuit pattern. Both covers include a "KEY STATS" or "AT A GLANCE" section.

The collapse of the consumer journey



67%

of consumers are open to completing transactions directly within AI



53%

of consumers trust AI more than traditional sources for recommendations



Consumers accept AI advertising but with conditions



71% Yes to AI Ads



23% No to AI Ads

BUT...

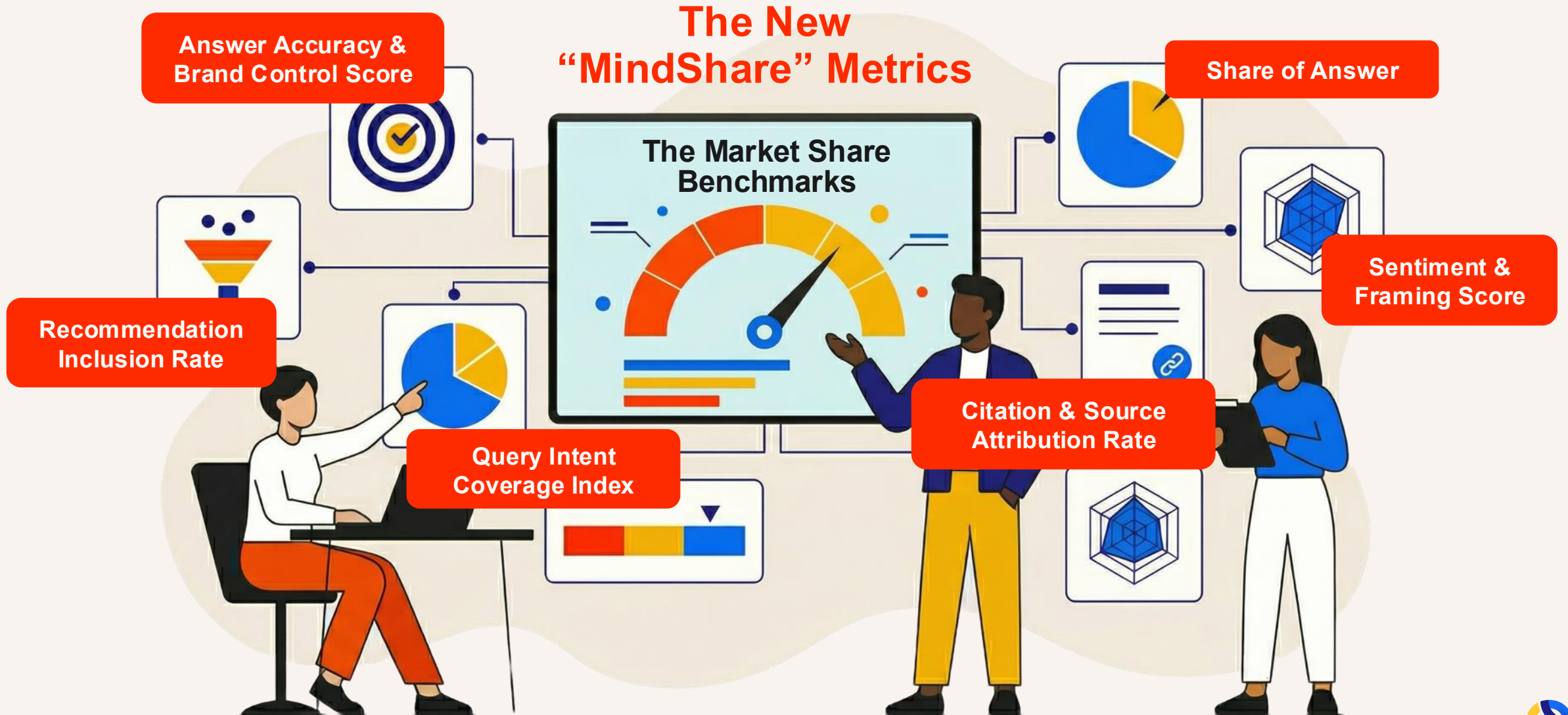
51% of consumers would reduce AI use if ads become too frequent or intrusive

45% of consumers want sponsored AI responses to be clearly labeled

In AI, monetization must feel like assistance, not interruption or forced purchase

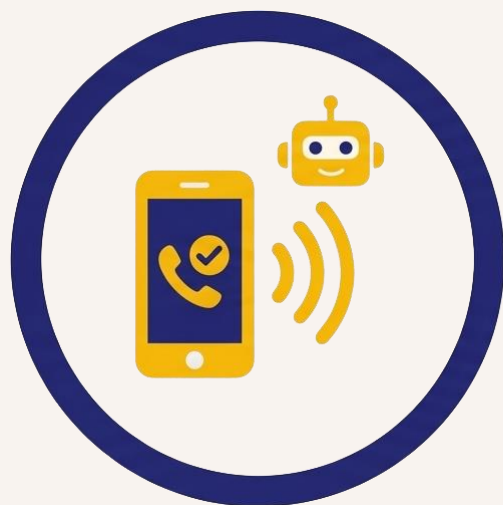


The new rules of AI visibility

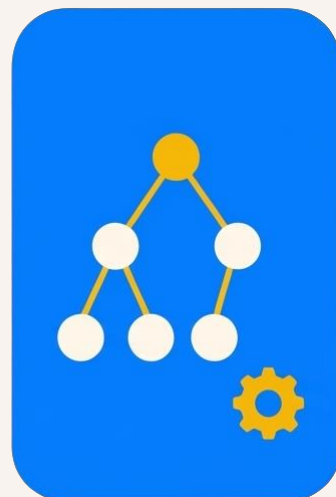


AI is rewiring consumer discovery and commerce

The (consumer) AI discovery to commerce life cycle



Access layer
*AI Assistant +
Device + Agent*



Decision layer
AI Platforms



Intelligence layer
LLMs



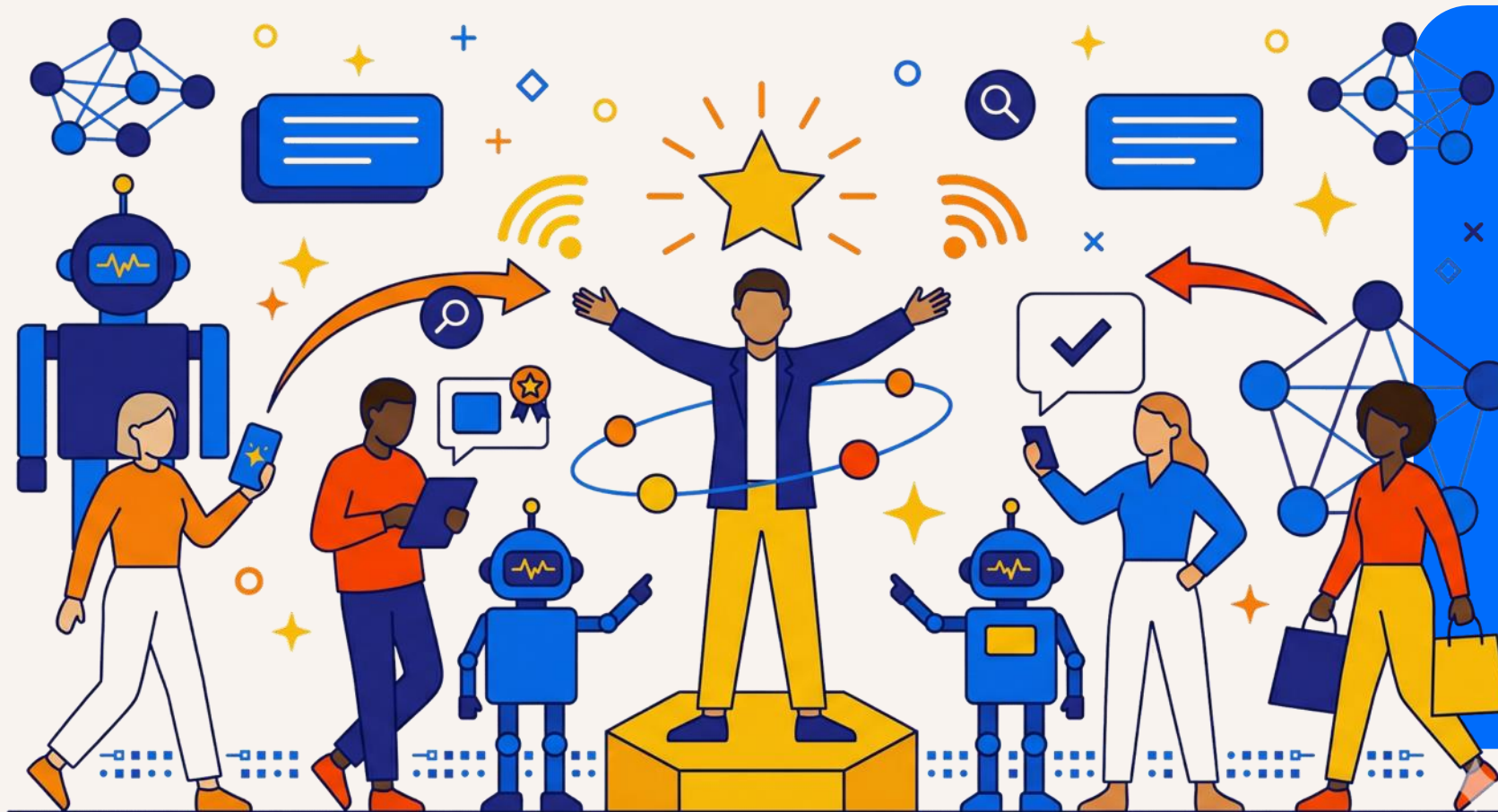
Personalization & context layer
Data + Memory



Commerce layer
*eCommerce + Payment
+ Fulfilment Apps*



Winning consumers in the AI-fueled world



From Visibility to Influence

“The winners won’t be the brands that are described by AI but the ones that shape what AI says.”

