IDC DIRECTIONS

When Consumers Lead

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

This excerpt is from a presentation at IDC Directions Boston on April 8, 2026.

Sandra Ng

Senior Vice President

Global Domain Leader

Devices, Consumers, Imaging & Japan

Tom Mainelli

Group Vice President

Device & Consumer Research

Greg Ireland

Senior Director

Consumer Markets & GenAI

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

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Source: IDC Consumer AI Survey, 2026 (N = 2,525); QG5a-G5f

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

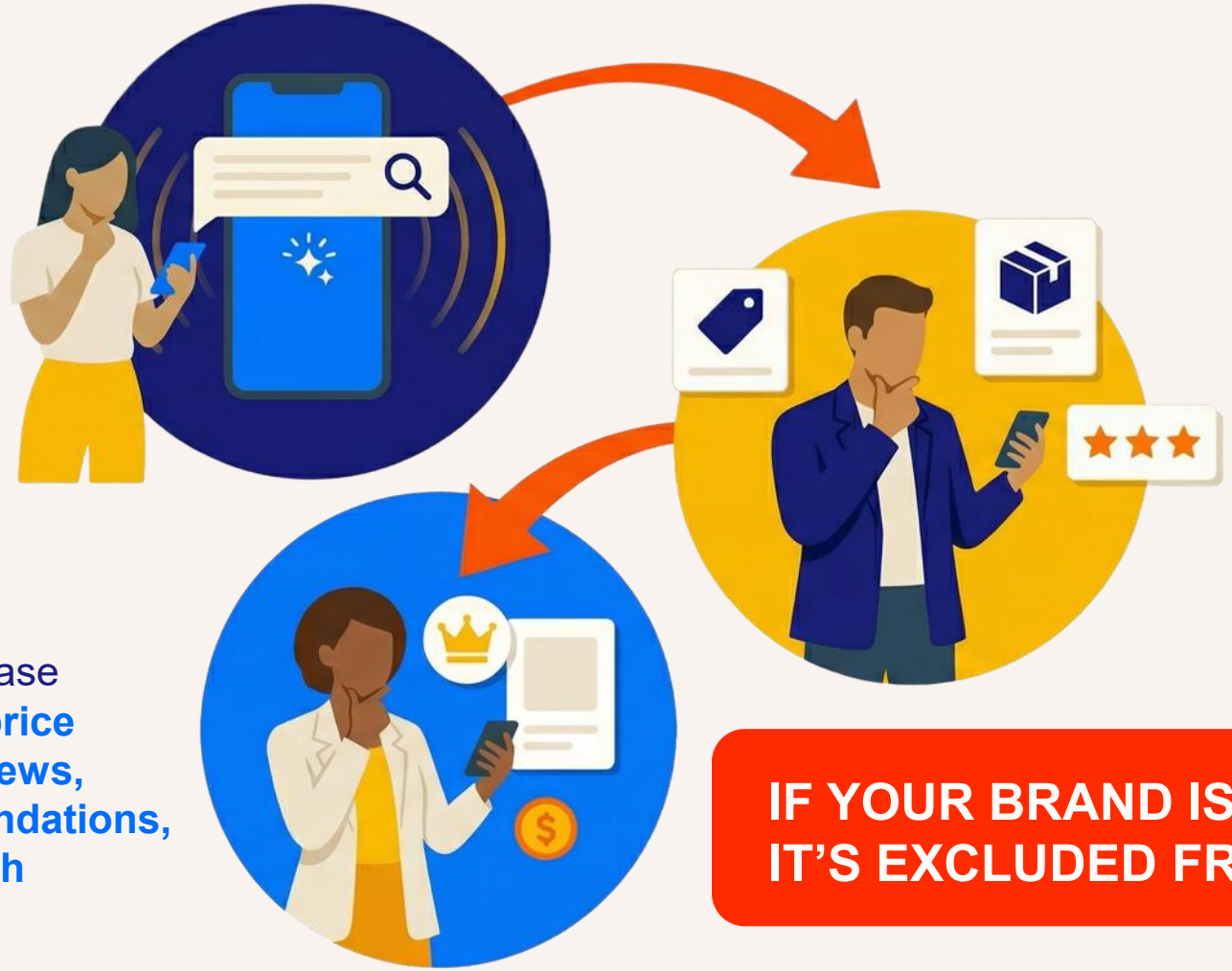
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Source: IDC Consumer AI Survey, 2026 (N = 2,525); QG1, G6, G7

AI is increasingly becoming the gatekeeper

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



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)

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

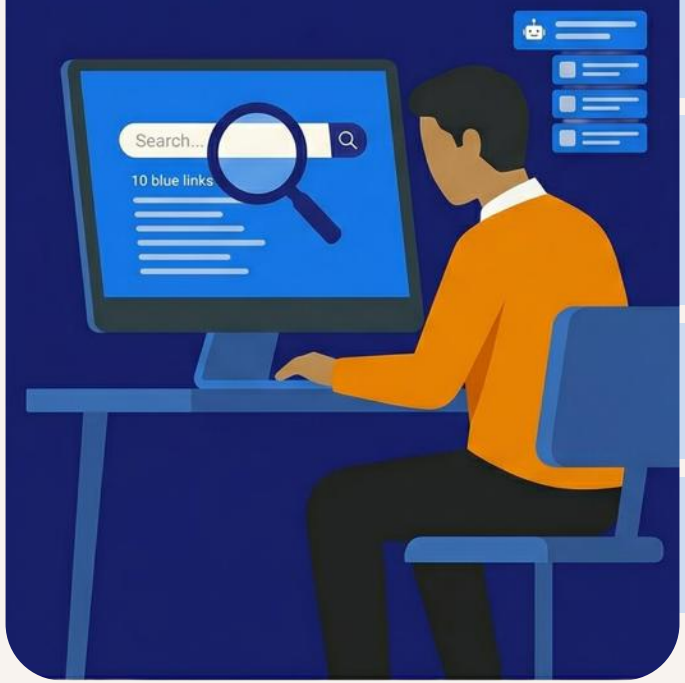
IF YOUR BRAND ISN'T SURFACED BY AI, IT'S EXCLUDED FROM THE DECISION

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Source: IDC Consumer AI Survey, 2026 (N = 2,525); QS3, S1, S4

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

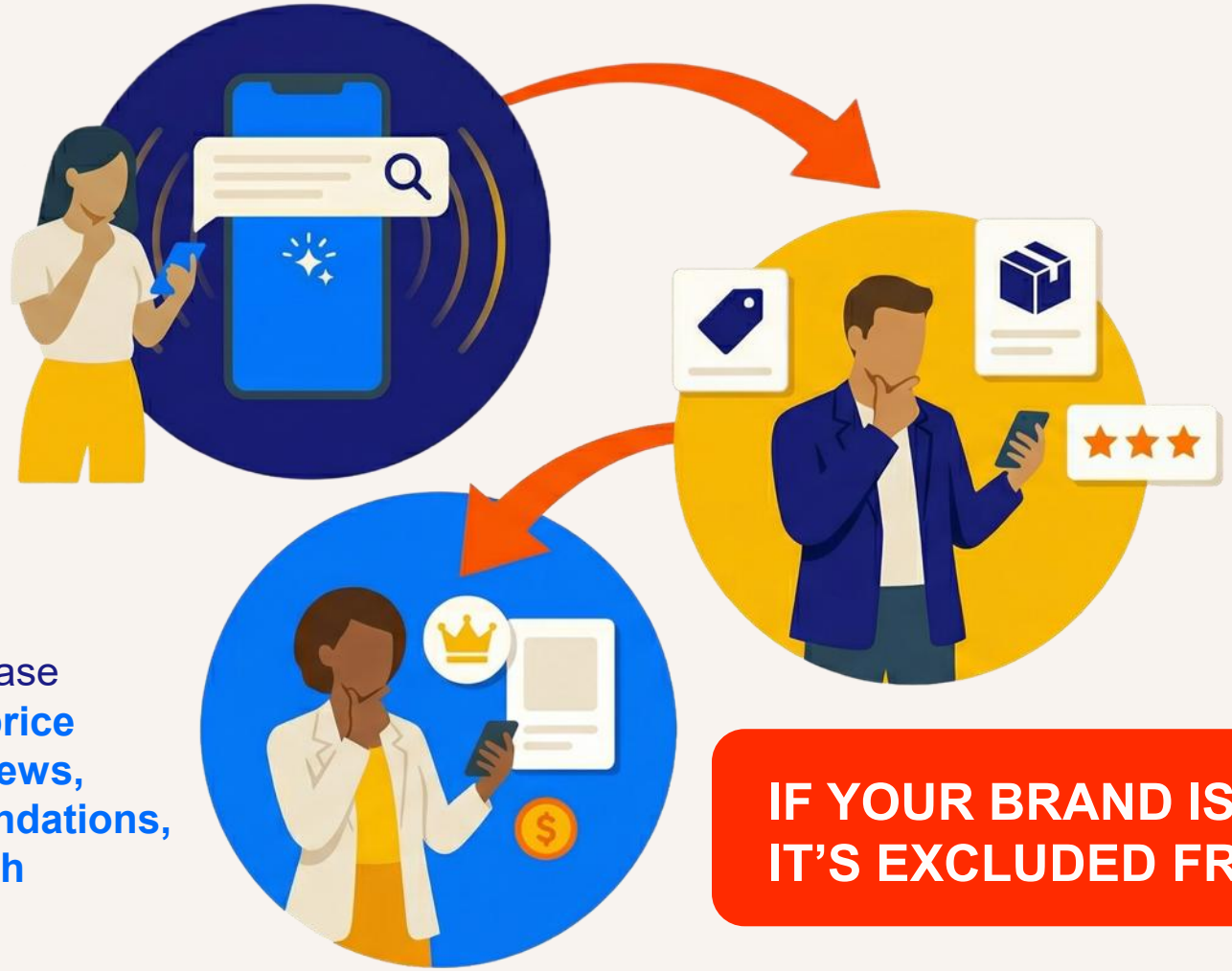
Control Point
AI Platforms

Results
Few Recommendations

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Source: IDC Consumer AI Survey, 2026 (N = 2,525); QS3

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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

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Source: IDC Consumer AI Survey, 2026 (N = 2,525); QS5, G8

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

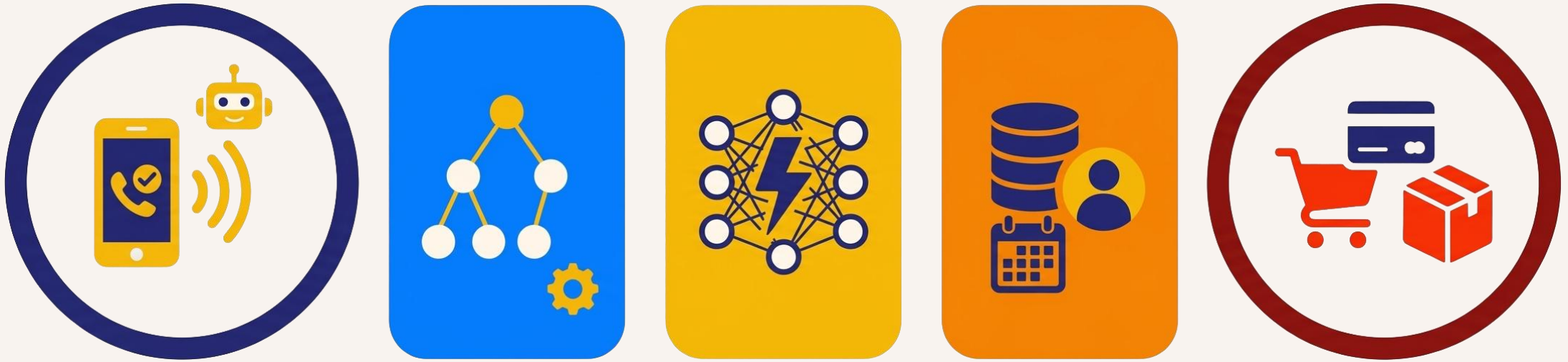
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Source: IDC Consumer AI Survey, 2026 (N = 2,525); QG14 - Top Four & Bottom Four Box; QS4

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

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Source: IDC Consumer AI Survey, 2026 (N = 2,525); QS3

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."

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Asia Pacific Headquarters

18 Cross
18 Cross Street
#11-01
Singapore 048423

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