

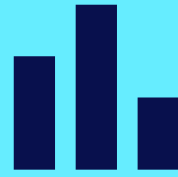


AI Intelligence Report

How AI Is Reshaping the Consumer Journey and Business Decisions

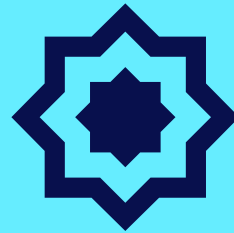
AI is Reshaping How People Search, Discover, and Decide.

Comscore's View of the AI Ecosystem



Measurement

Adoption, Usage, and Growth of AI Tools.



Consumer Impact

Consumer Journey, Path to Purchase, AI Chat Source Citations, and Informing Strategy to Influence the Path to Purchase.



Prompt Topics

Types of Prompts by Subject from Users and by AI Tool



 **COMSCORE**

The Reliable Foundation of the New **AI Reality**

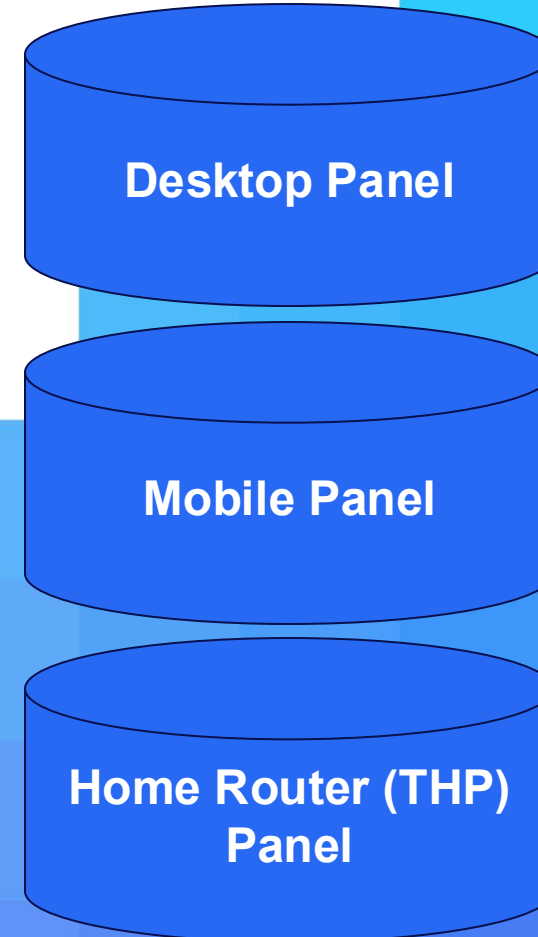
Our Measurement Framework

Exceptional Depth

- Unique Opt-In collection of complete user activity
- Industry leading dictionary classifications
- Comprehensive activity of behaviors on digital interactions
- Proprietary methodology for session level linkage to measure engagement cycle activity (i.e., prompt/response)
- 1st Party demographic & lifestyle indicators to enhance insights
- Trusted data science refined over decades fusing panel & census data
- Market proven data science for projections & market weightings

Experience and Scale

- Decades of continuous panel management history
- Global footprint
- Investment driven panel scale
- Expertise in managing recruitment and retainment
- End-to-End panel management





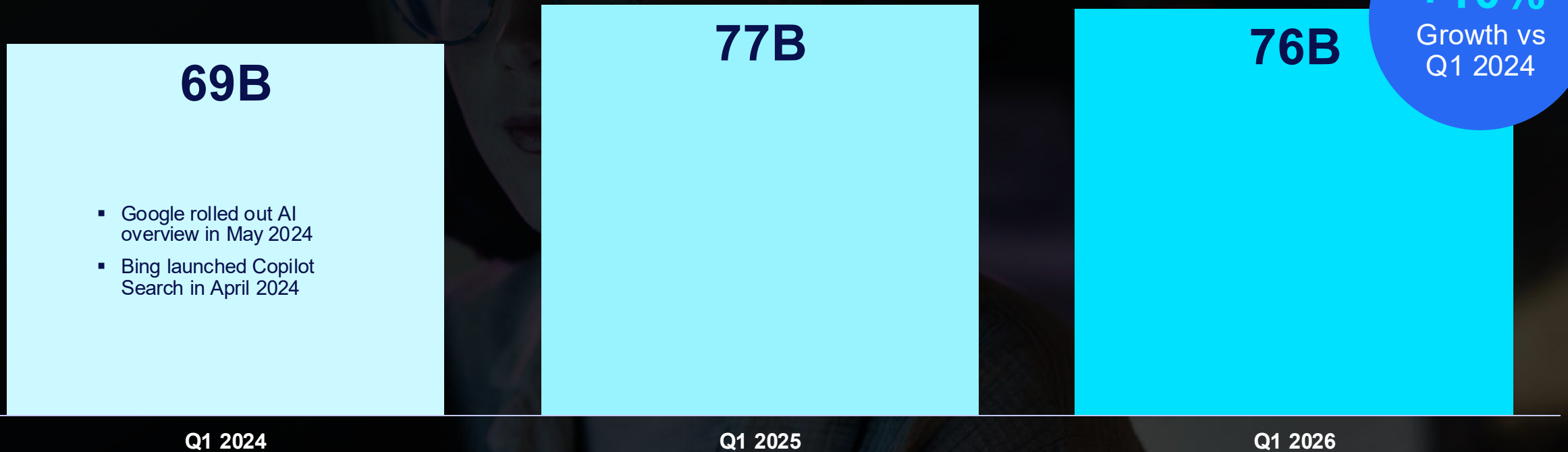
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Measurement

The Convergence of Search and Intelligence

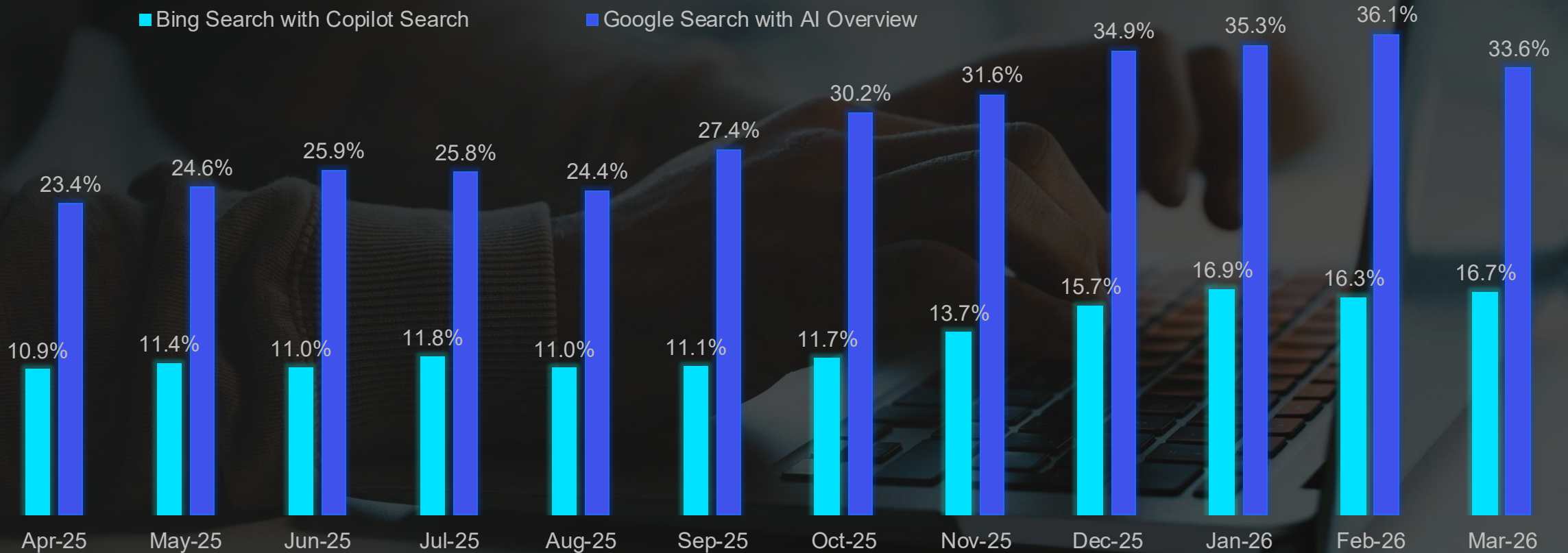
AI Search Fuels the Evolution Of an Everyday Activity

All Search in U.S. (Desktop)
Internet Searches



AI Overviews Increase within Search Engines

Share of Searches with an AI Overview in Google and Bing (Desktop)



Depth in Search When SEO Meets AI: Unlocking A World Beyond Traditional Blue Links

Among the top listed AI overview citations, the percentage of searches where the source is cited in in the AI overview

Citation Rank	Entertainment	CITED DOMAIN ON GOOGLE & BING
1	youtube.com	24%
2	wikipedia.org	18%
3	fandom.com	15%
4	reddit.com	13%
5	imdb.com	6%
6	facebook.com	6%
7	genius.com	3%
8	instagram.com	3%
9	tiktok.com	2%
10	screenrant.com	2%
11	roonby.com	2%
12	spotify.com	2%
13	yahoo.com	2%
14	quora.com	2%
15	apple.com	2%
16	progameguides.com	2%
17	sportskeeda.com	2%
18	netflix.com	2%
19	ign.com	1%
20	amazon.com	1%

Citation Rank	Sports	CITED DOMAIN ON GOOGLE & BING
1	youtube.com	22%
2	wikipedia.org	16%
3	espn.com	11%
4	reddit.com	7%
5	yahoo.com	7%
6	cbssports.com	5%
7	sportskeeda.com	5%
8	sportingnews.com	5%
9	nfl.com	3%
10	statmuse.com	3%
11	instagram.com	3%
12	nba.com	3%
13	olympics.com	2%
14	si.com	2%
15	facebook.com	2%
16	fandom.com	2%
17	usatoday.com	2%
18	bleacherreport.com	2%
19	tiktok.com	2%
20	nascar.com	2%



Not All Citations are Created Equal: Category Leaders Highlight both Opportunities and Risks

Among the top listed AI overview citations, the percentage of searches where the source is cited in in the AI overview

Citation Rank	Retail	CITED DOMAIN ON GOOGLE AND BING
1	youtube.com	19%
2	amazon.com	13%
3	wikipedia.org	8%
4	reddit.com	7%
5	apple.com	4%
6	ebay.com	4%
7	walmart.com	3%
8	wikihow.com	3%
9	fandom.com	2%
10	microsoft.com	2%
11	bestbuy.com	2%
12	facebook.com	1%
13	homedepot.com	1%
14	google.com	1%
15	healthline.com	1%
16	etsy.com	1%
17	justanswer.com	1%
18	clevelandclinic.org	1%
19	autozone.com	1%
20	target.com	1%

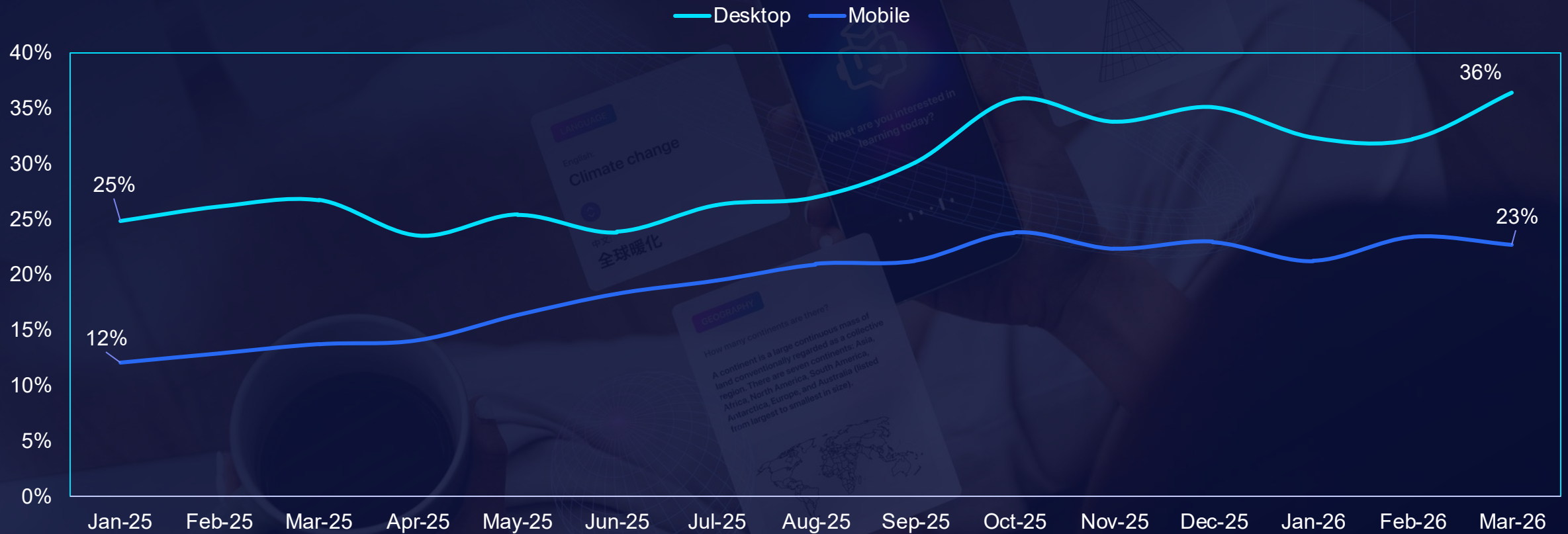
Citation Rank	Financial Services	CITED DOMAIN ON GOOGLE AND BING
1	irs.gov	10%
2	nerdwallet.com	9%
3	youtube.com	7%
4	intuit.com	7%
5	bankrate.com	5%
6	usnews.com	4%
7	freetaxusa.com	4%
8	forbes.com	4%
9	cnbc.com	4%
10	investopedia.com	4%
11	fidelity.com	4%
12	reddit.com	3%
13	wikipedia.org	3%
14	legalclarity.org	3%
15	smartasset.com	3%
16	hrblock.com	2%
17	businessinsider.com	2%
18	fool.com	2%
19	wise.com	2%
20	chase.com	2%



From Search to Assistance:

In Q1, AI Assistant Tools Reached **36% on Desktop** and **23% on Mobile**

Desktop and Mobile Visitors to AI Assistant Tools



Source: Comscore CustomIQ, US, Desktop P2+ and Mobile P18+; Jan 2025-Mar 2026.

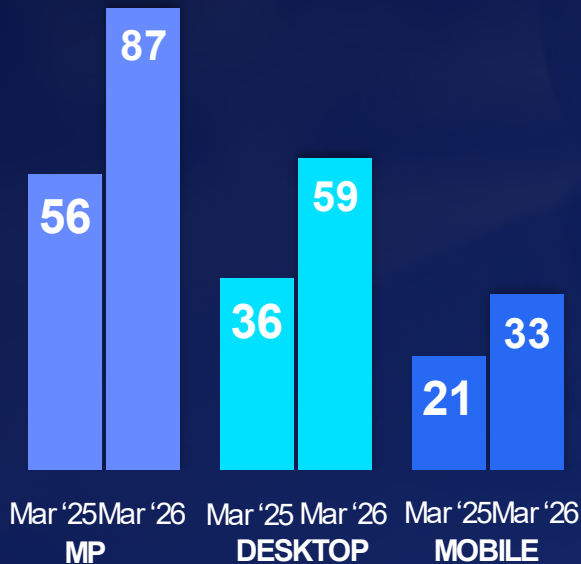


Different Tools, Similar Trajectory

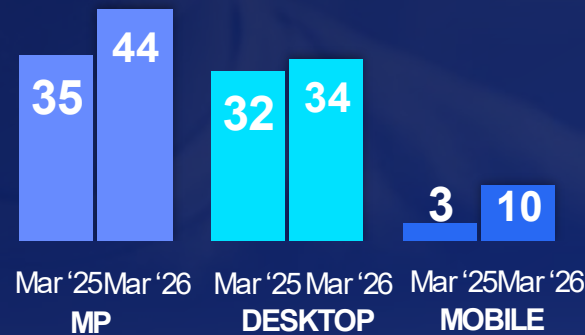
ChatGPT Leads the AI Assistant Category that Shows Growth Across the Board

Desktop and Mobile Visitors to Top AI Assistant Tools in Millions

ChatGPT



Copilot



Gemini



Launched ChatGPT 5 (Aug '25) and Expanded SuperTools ecosystem with image editing, voice, agents, and planning tools (Q3 '25).

“Copilot+ PC” initiative and integration into Windows 11 upgrades (throughout 2025) and Copilot Studio feature update (Oct '25).

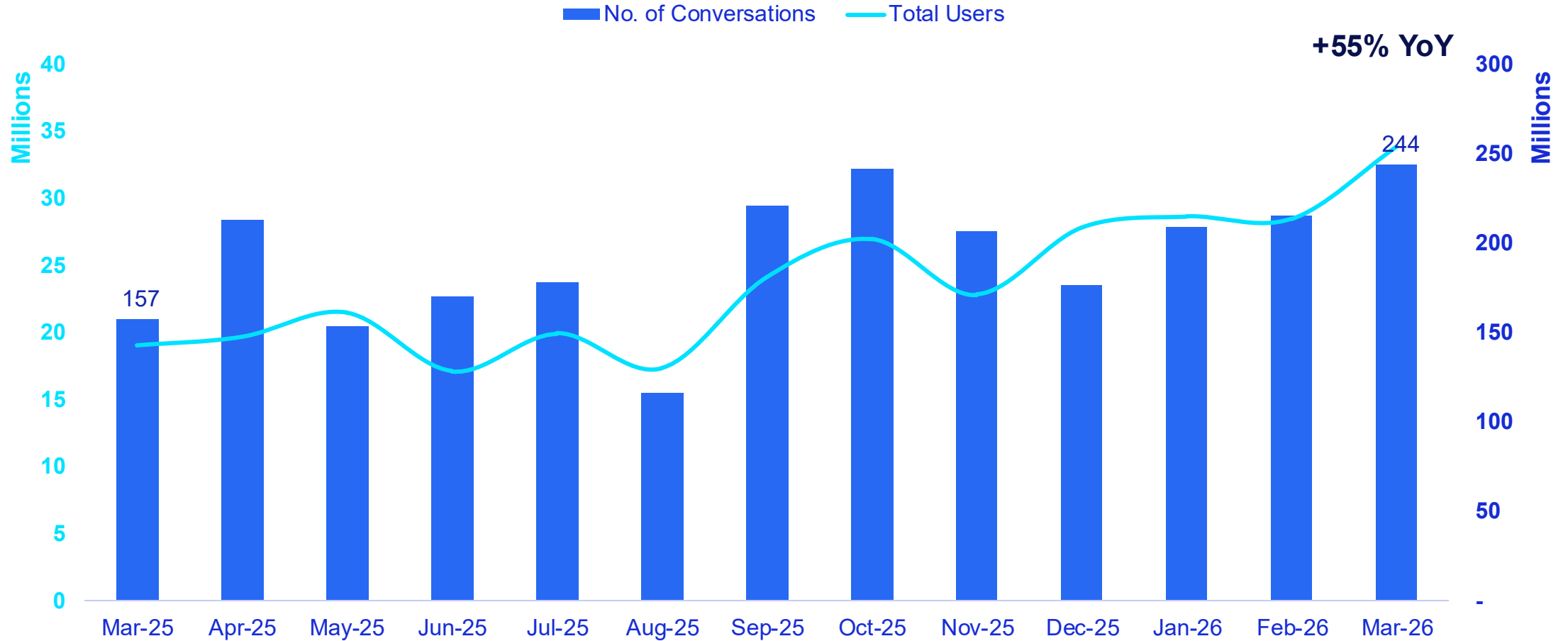
Released Gemini 2.5 Pro / Flash series (Jun '25) and increased Android, Search, and Workspace integration efforts (Mid to Late 2025).

Source: Comscore CustomIQ, US, Desktop P2+ and Mobile P18+; Mar 2025-Mar 2026



Record High Conversations on Chat GPT in Q1

Total Users & Conversations on ChatGPT (Desktop)

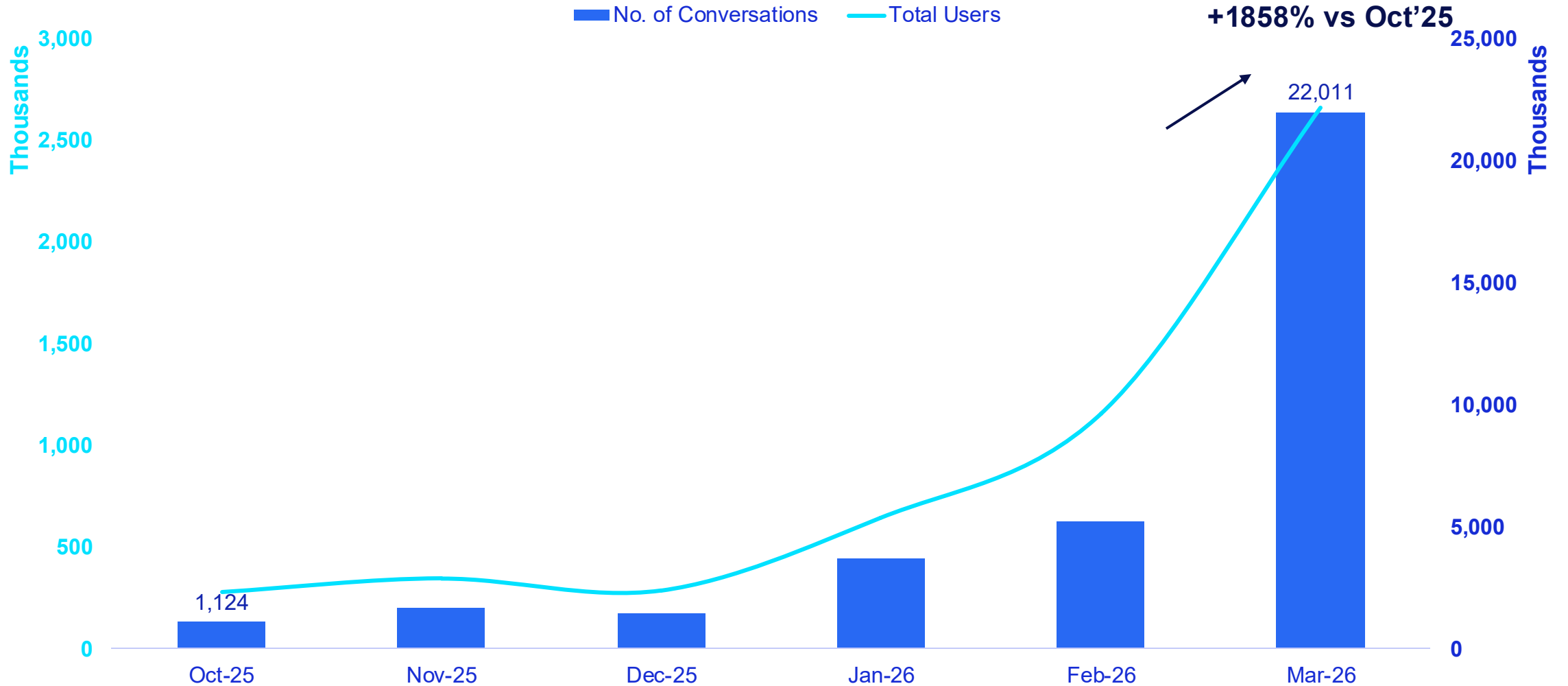


Source: Comscore CustomIQ, US, Desktop P2+ and Mobile P18+; Mar 2025-Mar 2026



Claude Experiences Breakout Growth in Mar 2026

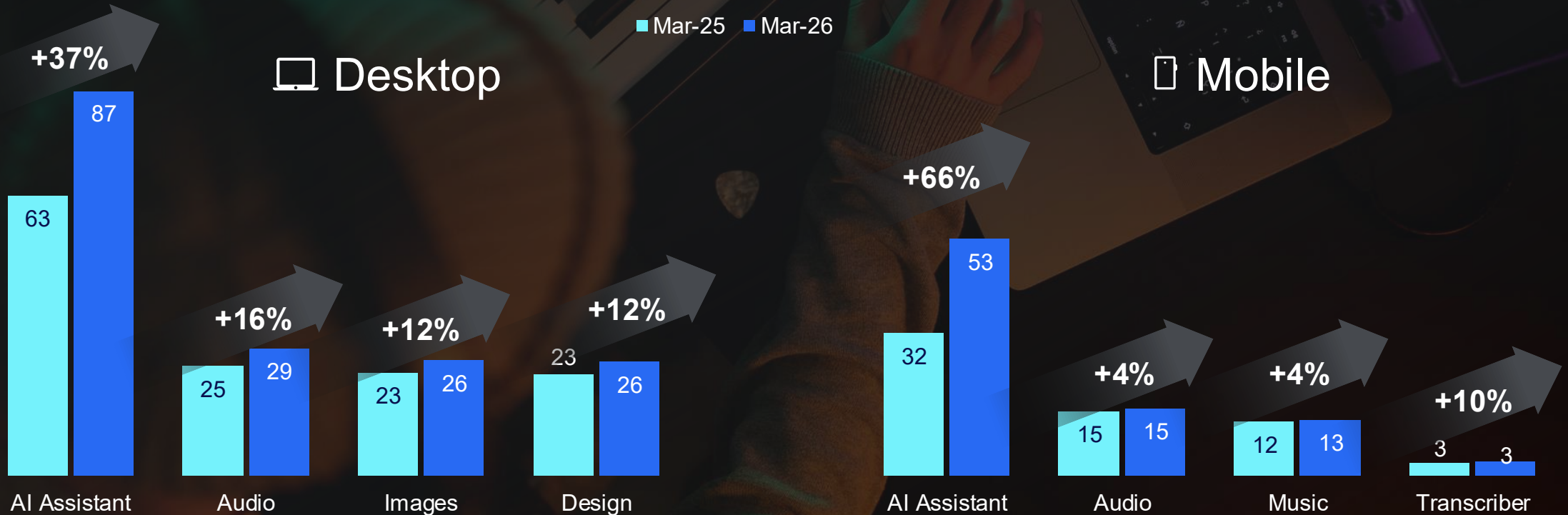
Total Users & Conversations on Claude (Desktop)



Generalization to Specialization:

AI Growth Extends into a Wider Range of Productivity and Entertainment Applications

Fastest Growing Top Categories YoY
(Desktop and Mobile Visitors in Millions)



Source: Comscore CustomIQ, US, Desktop P2+ and Mobile P18+; Mar 2025-Mar 2026.

Comscore's Gen AI custom data includes 'Dedicated AI-Powered entities', which are fully powered by AI and provide an end-to-end generative AI experience, and 'Partially AI-Powered entities', which may only incorporate AI as a supplemental feature. While the AI capabilities are limited to some features, these entities are still included to provide a comprehensive view of the overall AI market.



Unpacking Platform Trends Through a Demographic Lens



Adoption to Demographic Growth:

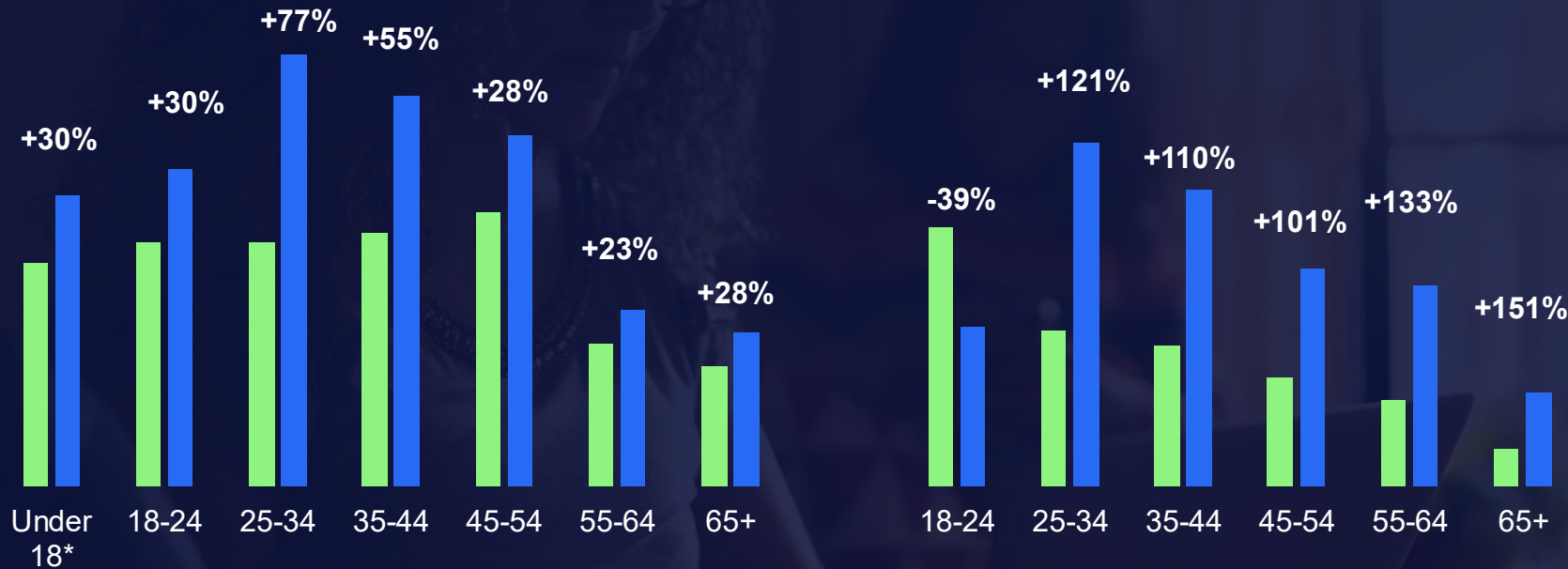
Usage of AI Assistants Are Expanding Across All Age Groups

Visitor Age Breakdown: AI Assistant Category in Millions

■ Mar 25 ■ Mar 26

🖥️ Desktop

📱 Mobile



Momentum Builds Up

- The 25-34 cohort drove the largest growth on both desktop and mobile, emerging as the core power user segment.
- Desktop growth is broad based across all ages, with the 25-44 age segment leading, likely driven by workplace productivity use cases.
- On Mobile, older demographics surged, signaling that AI assistant tools are expanding well beyond early adopters into mainstream usage.

Source: Comscore CustomIQ, US, Desktop P2+ and Mobile P18+; Mar 2025 - Mar 2026.

Comscore's Gen AI custom data includes 'Dedicated AI-Powered entities', which are fully powered by AI and provide an end-to-end generative AI experience, and 'Partially AI-Powered entities', which may only incorporate AI as a supplemental feature. While the AI capabilities are limited to some features, these entities are still included to provide a comprehensive view of the overall AI market.



A Closer Look at Adoption

	OPENAI GEN AI (CHATGPT)		MICROSOFT GEN AI (COPILOT)		GOOGLE GEN AI (GEMINI)	
	Mar-25	Mar-26	Mar-25	Mar-26	Mar-25	Mar-26
DESKTOP						
Male	112	107	121	106	96	105
Female	87	92	78	94	104	95
MOBILE						
Male	101	87	98	77	119	82
Female	98	113	101	123	81	118

100

Internet Pop. Average

Overindex ↑

Underindex ↓

Index compares an age group's share of platform visitors to its share of the total internet population. 100 = average representation.

Read as: The OpenAI Male Index is 107 in March 2026, meaning the Male group has a 7% higher representation when compared to the total internet population.

Source: Comscore CustomIQ, US, Mobile P18+; Mar 2025-Mar 2026. Comscore's Gen AI custom data includes 'Dedicated AI-Powered entities', which are fully powered by AI and provide an end-to-end generative AI experience, and 'Partially AI-Powered entities', which may only incorporate AI as a supplemental feature. While the AI capabilities are limited to some features, these entities are still included to provide a comprehensive view of the overall AI market.



Core Insights:

Measurement

AI Search: The New Entry Point

The way AI search summarizes and cites your brand or content represents the starting point for safeguarding visibility, correcting narratives, and powering AI-generated answers that support demand and monetization.

Category Leadership Is Being Redefined by AI

Where influence is migrating becomes clearer when you identify which brands, publishers, and signals AI prioritizes—enabling more strategic investment in consideration and citation share.

Content Creation and Consumption Are Evolving Through AI

Monitoring how people engage with GenAI assistants and creative tools enables faster decision-making and opens up new avenues for distribution and revenue.





 COMSCORE

Consumer Impact

Customization, Influence, and Opportunity

How Understanding the Customer Journey Helps Marketers

1

Understanding
Customer
Behavior

2

Improving
Personalization

3

Optimizing
Marketing Spend

4

Enhancing
Customer
Experience

5

Enabling Data-
Driven Decisions

6

Boosting
Retention and
Advocacy

A Comscore AI Search Perspective: Consumer Credit Card Acquisition Journey



Gen AI Visitation

Benchmark adoption trends and growth of major players



AI Summary Detection in Search

How summaries reshape search behavior



AI Prompts & Responses

Insights into consumer intent and interaction



Custom AI Solutions

Segmenting/Cohort analyses, Data Feeds

AI Summary Detection in Search Data

AI Overviews are now a standard part of the paid search touchpoint for consumer credit card acquisitions, appearing alongside almost half of all paid search ads.

That presence is concentrated in generic discovery searches, which historically drove comparison and affiliate (aggregator site) activity.

Importantly, this is not just an awareness-level change as nearly a third of credit card applicants were exposed to AI Overviews, and a measurable share applied from pages where those overviews appeared

Google AI Overview

The screenshot shows a Google search for "how to survive heatwave". The AI Overview section provides a summary: "To survive a heatwave, prioritize staying hydrated, cooling down, and limiting outdoor activity. Drink plenty of water, take cool showers, and seek shade when outside. If you must be outdoors, wear loose, light-colored clothing and a hat. Check in on vulnerable individuals like older adults and neighbors." Below this, it lists "Detailed Steps to Survive a Heatwave":

- 1. Stay Hydrated:**
 - Drink water regularly, even if you don't feel thirsty.
 - Avoid caffeine and alcohol, which can dehydrate you.
 - Consider adding electrolytes to your water or drinking sports drinks.
- 2. Cool Down:**
 - **Stay indoors:** If possible, spend time in air-conditioned spaces.
 - **Take cool showers or baths:** This is an effective way to quickly lower your body temperature.
 - **Use fans:** Fans can help circulate air and create a more comfortable environment.
 - **Wet skin:** Use a wet cloth or spray bottle to cool yourself down.
 - **Head downstairs:** Hot air rises, so lower floors of a home may be cooler.

On the right side of the search results, there are several related search suggestions with thumbnails:

- 11 Tips on How To Survive A Heat Wave Without Air-Conditioning** (MedicineNet)
- Beat the heat: top tips for how to keep cool in hot weather - Red Cross** (Red Cross)
- Extreme Heat - Ready.gov** (Ready.gov)

A "Show all" button is located at the bottom of the suggestions.

Appears on the traditional Google search results page and offered AI-generated summaries.



AI Overviews Reshape the Paid Search Environment for **Consumer Credit Card Shopping**

AI is now a standard part of the search results page

Credit Card Search Ads with AI Search Overviews

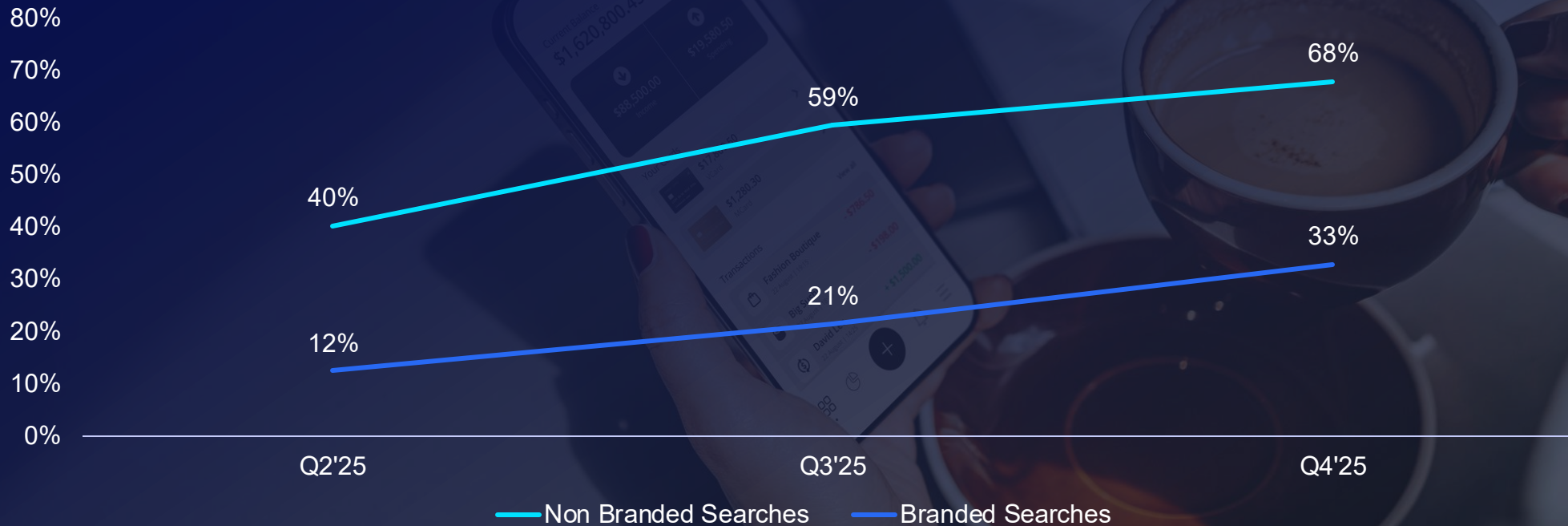


Source: Comscore Proprietary Desktop Panel.
Data based on top 9 National Credit Card Issuers
Credit Card Paid Search Ads; Percent of Ads that had an AI Summary on the page.



Search Discovery is Shifting: AI Overviews Are Intercepting High-intent Queries For Affiliate Sites And Card Issuers

Card Search Ads with AI Search Overviews by Search Type



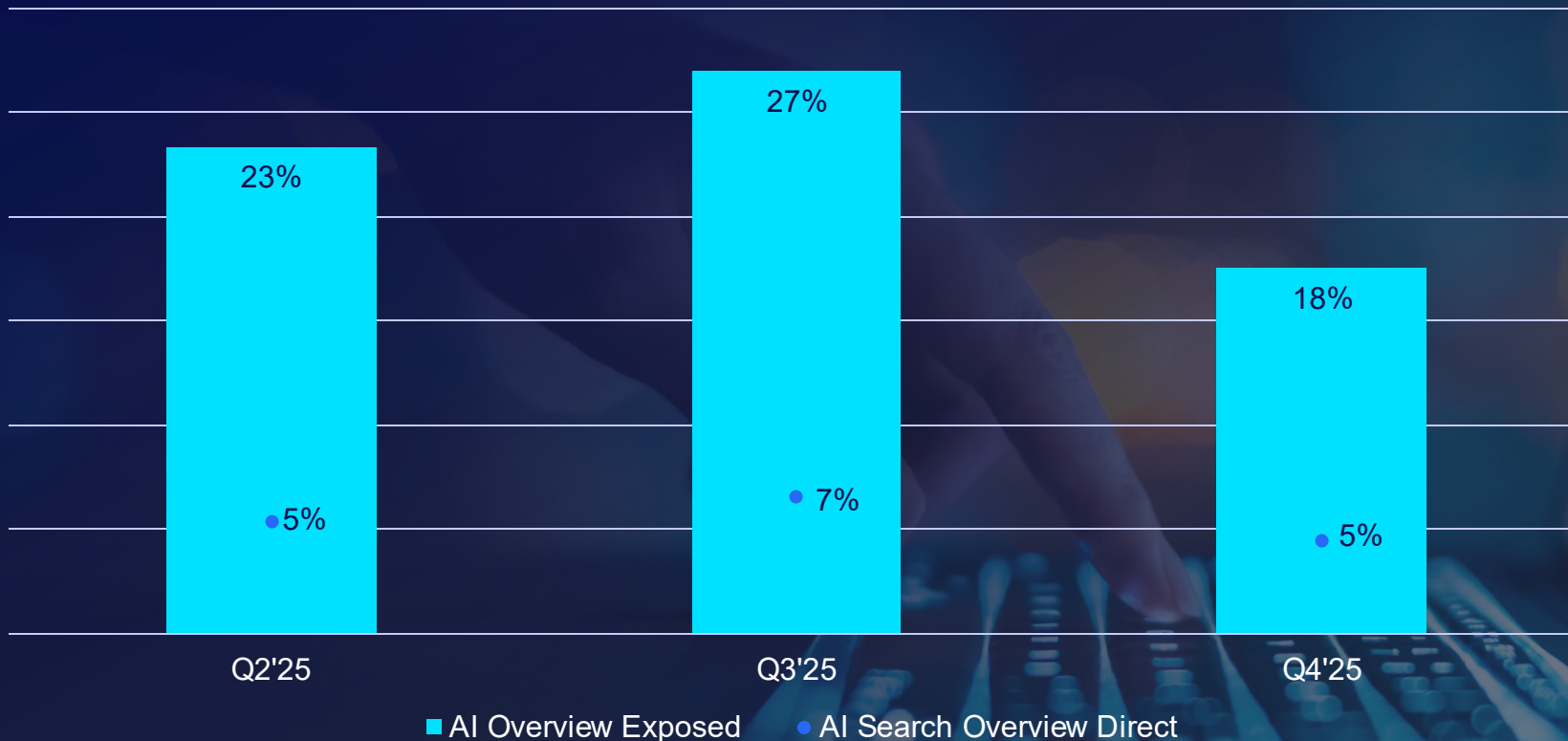
While the gap between generic and branded search remains substantial, AI overviews on branded searches **grew 3x** between 2Q25 and 4Q25

Source: Comscore Proprietary Desktop Panel.
Data based on top 9 National Credit Card Issuers
Credit Card Paid Search Ads; Percent of Ads that had an AI Summary on the page.



AI is Reshaping the Path to Credit Card Applications

Consumer Credit Card Submissions Exposure to AI Overviews



Over the past three quarters:

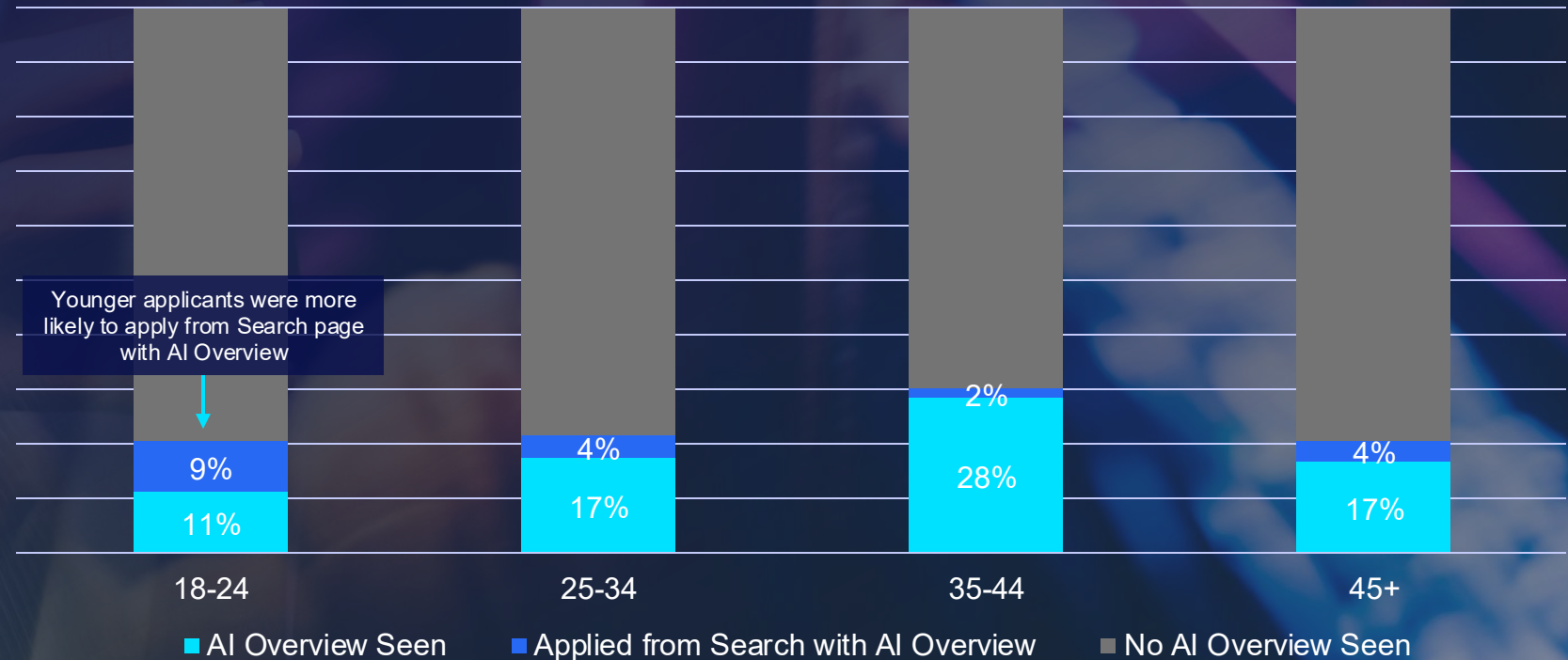
~25%
of applicants were exposed to AI Overviews

~5%
applied directly from those pages

Source: Comscore Proprietary Desktop Panel.
Data based on top 9 National Credit Card Issuers
Consumer Credit Card Submissions

Exposure Peaks with Older Audiences, Action Skews to the Younger Generation

Percent of Credit Card Applicants that Saw an AI Overview on a Credit Card Related Search by Age



A35-44

Are Most Likely to See AI Overviews

A18-24

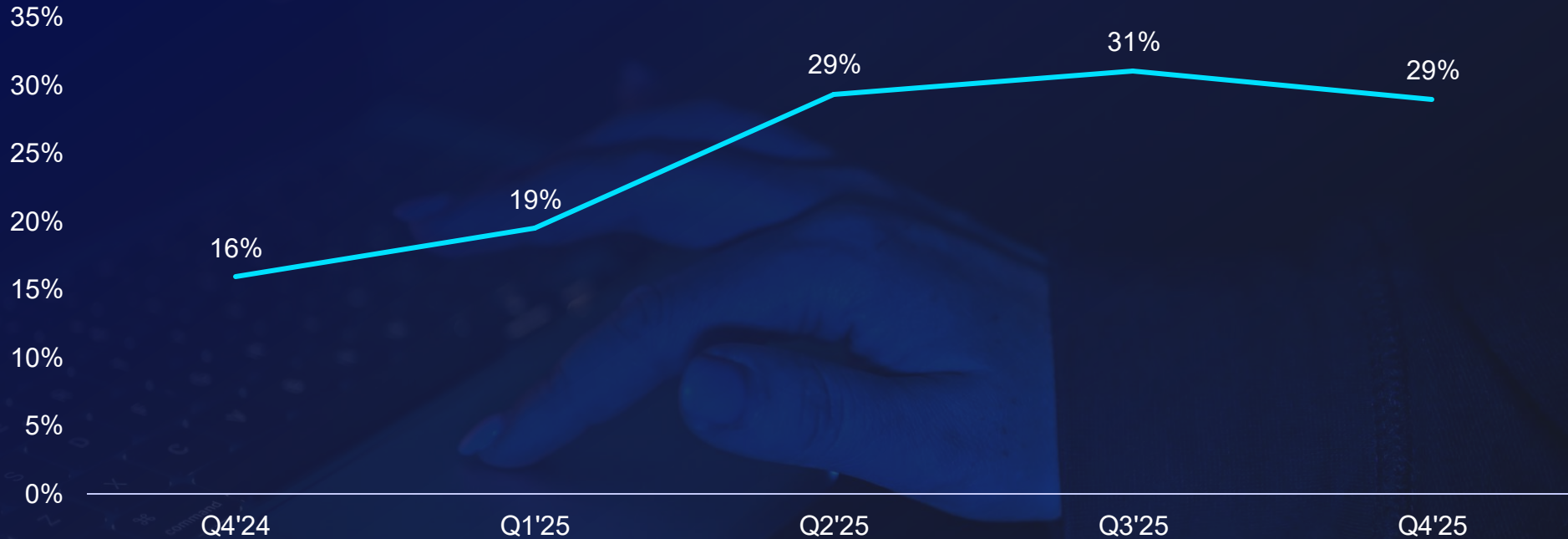
Are 2-5x More Likely to Apply Directly from AI Overviews

Gen AI is Reshaping the Digital Journey



GenAI is Becoming a Go-To Tool for In-Market Card Applicants

Card Applicants that Visited Gen AI in 30 Days Prior to Applying



Throughout most of 2025, **nearly one-third** of credit card applicants engaged with an AI tool during their decision journey

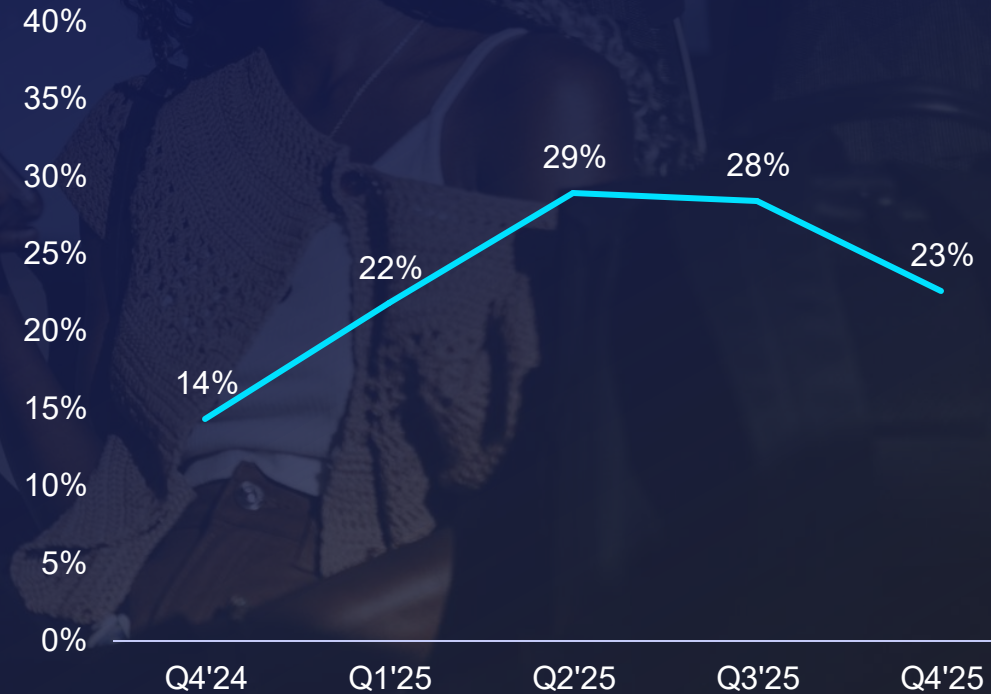


Mobile Leads GenAI Engagement; Desktop Adoption Has Gained Some Ground

Card Applicants that Visited Gen AI in 30 Days Prior to Applying - Mobile

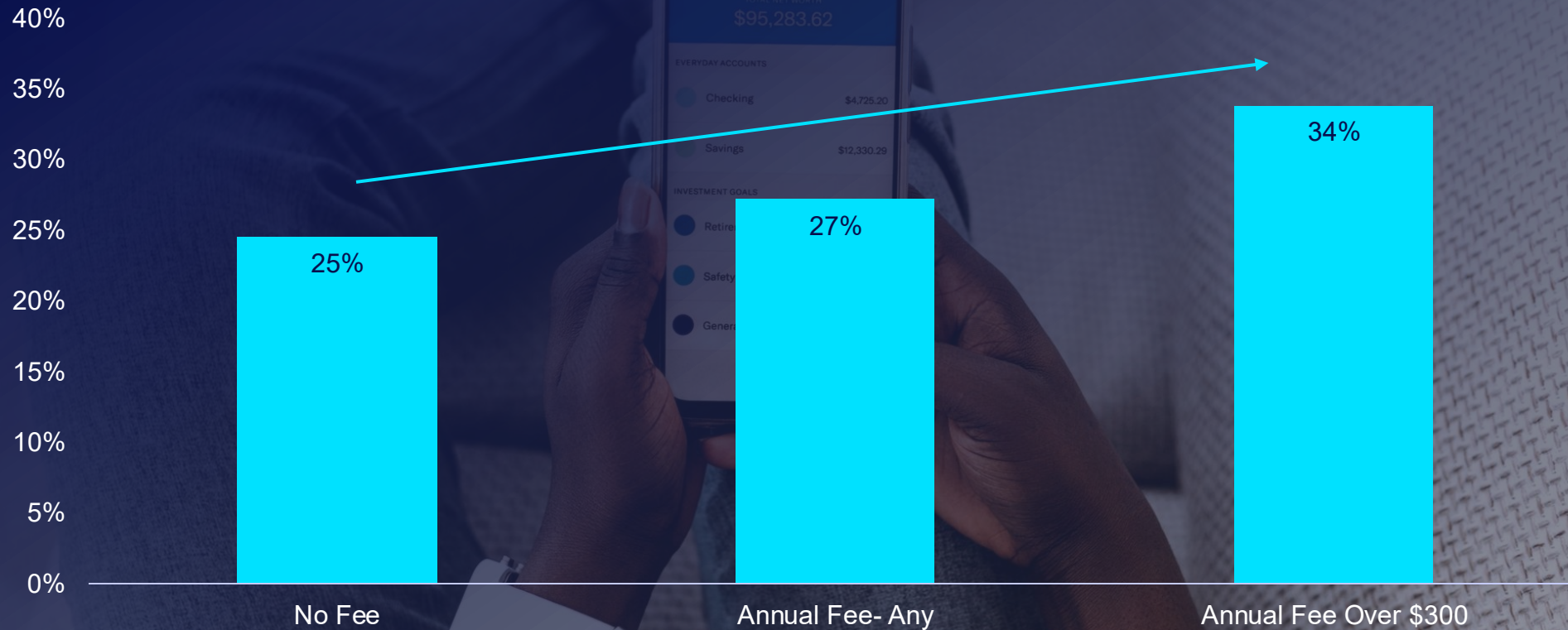


Card Applicants that Visited Gen AI in 30 Days Prior to Applying - Desktop



Premium Card - \$300 Annual Fee - Applicants are **More Likely** to Engage with GenAI

GenAI Usage Before Applying for a Credit Card

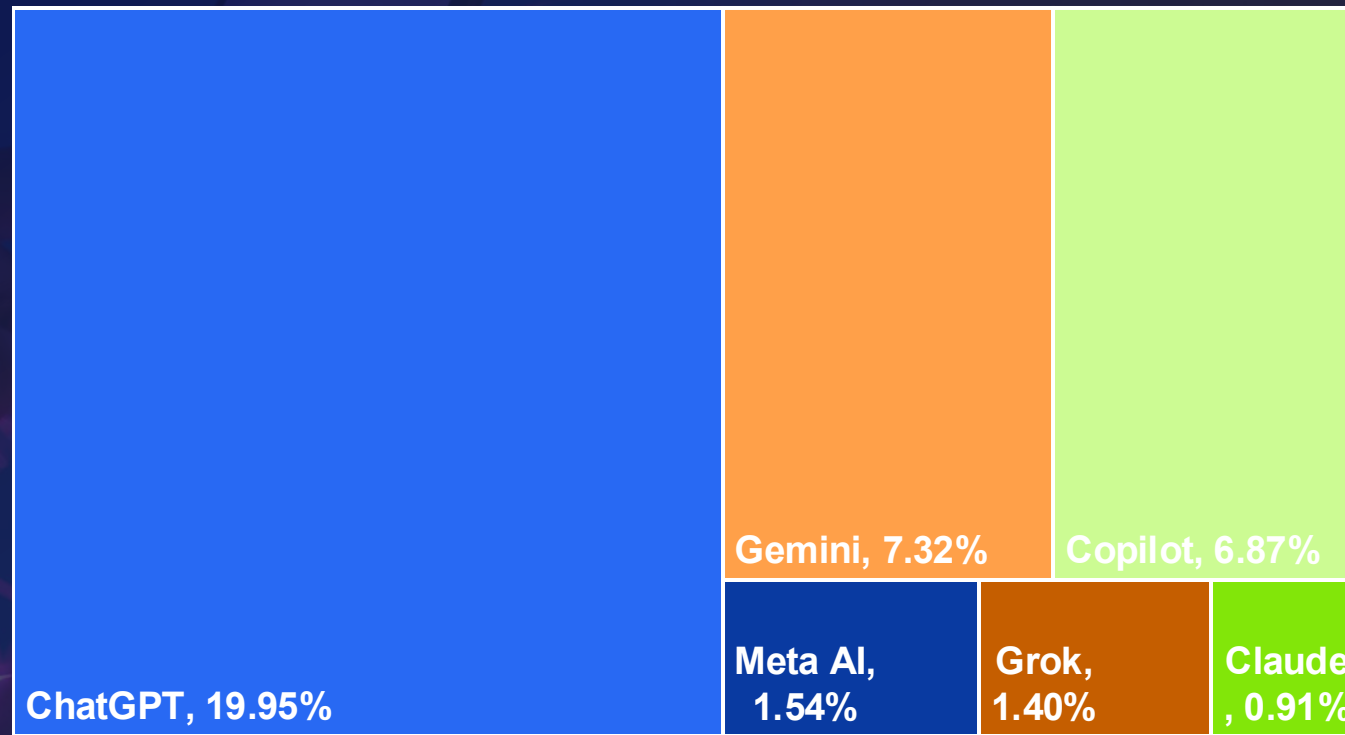


Source: Comscore Desktop and Mobile Panels
Percent of Total Digital Consumer Credit Card Applicants that visited a GenAI Site
Data based on top 9 National Credit Card Issuers; Q2'24-Q4'25
Includes ChatGPT, Claude, Copilot, Expertise, Gemini, Grok, Meta AI, Pi AI, X AI



Card Applicants Consistently Turn to ChatGPT During their Decision Journey

GenAI Usage Among Card Applicants - 30 Days Prior to Applying



In 4Q25:

~20%

Of Applicants used ChatGPT

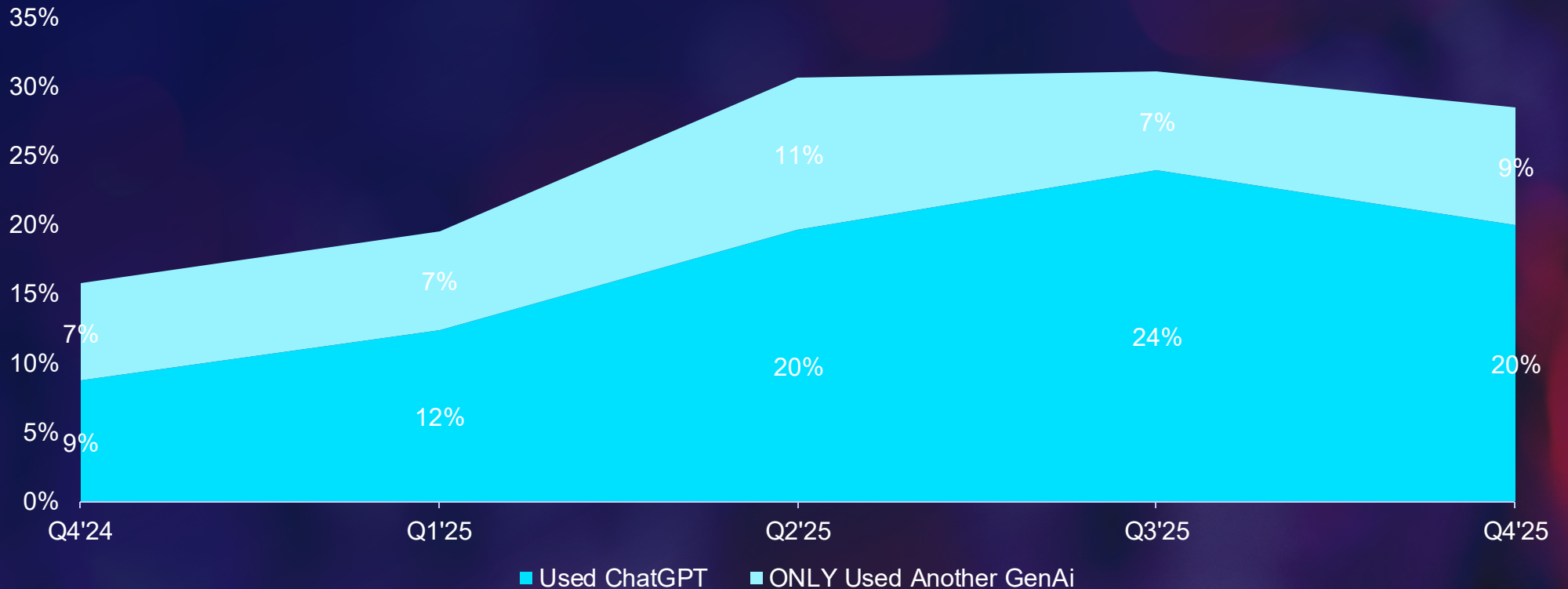
~7%

Of Applicants used Gemini or CoPilot



The Majority of Credit Card Applicants who used GenAI Only Used ChatGPT

Share Of GenAI-using Card Applicants by Tool Usage Mix



In Q4'24:

ChatGPT was **1.3x higher** than all others, growing to more than **2.2x**, signaling an acceleration to their market lead

Source: Comscore Desktop and Mobile Panels
 Percent of Total Digital Consumer Credit Card Applicants that visited a GenAI Site
 Data based on top 9 National Credit Card Issuers; Q4'25
 Includes ChatGPT, Claude, Copilot, Expertise, Gemini, Grok, Meta AI, Pi AI, X AI

GenAI Platforms Attract Different Age Audiences Among Card Applicants

Claude and ChatGPT skew younger, while Gemini and Copilot are more popular with those over 45

Source: Comscore Desktop and Mobile Panels
 Percent of Total Digital Consumer Credit Card Applicants that visited a GenAI Site
 Data based on top 9 National Credit Card Issuers; Q4'25
 Includes ChatGPT, Claude, Copilot, Expertise, Gemini, Grok, Meta AI, Pi AI, X AI

Percent of Credit Card Applicants in Each Age Group Who Used Each GenAI Tool

	Any GenAI	ChatGPT	Gemini	Copilot	Claude
18-24	30%	21%	11%	5%	2%
25-34	34%	27%	7%	5%	1%
35-44	32%	25%	5%	8%	2%
45+	24%	14%	8%	8%	0%

Read as: Percent of applicants in each age band who used each GenAI tool



Core Insights:

Consumer Impact

Discovery and Consideration Now Depend on AI

Tailoring content for AI-powered discovery channels is critical to influencing decisions where they happen and protecting referral value at the point of decision.

The Expanding Role of AI in Consumer Decisions

Reallocate investment and content to match AI touchpoints and establish well-defined attribution and licensing frameworks for data usage

The "Final Check" Before Purchase Now Runs Through AI

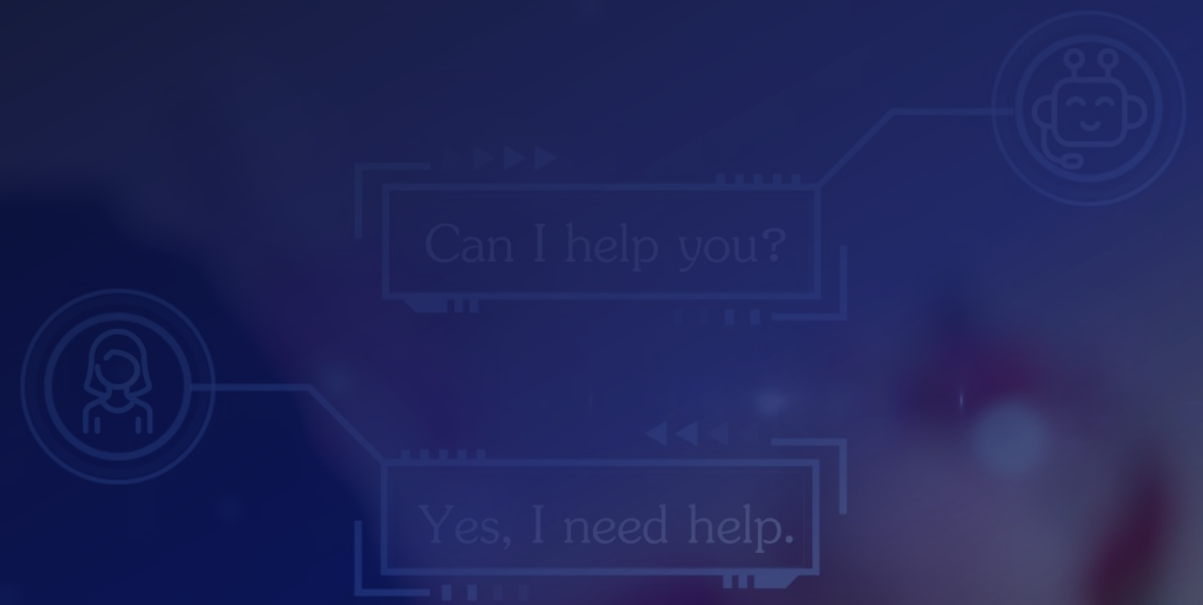
Structure content to highlight your differentiators and bundle high-intent formats like comparisons to help earn valuable citations



 COMSCORE

Prompts:

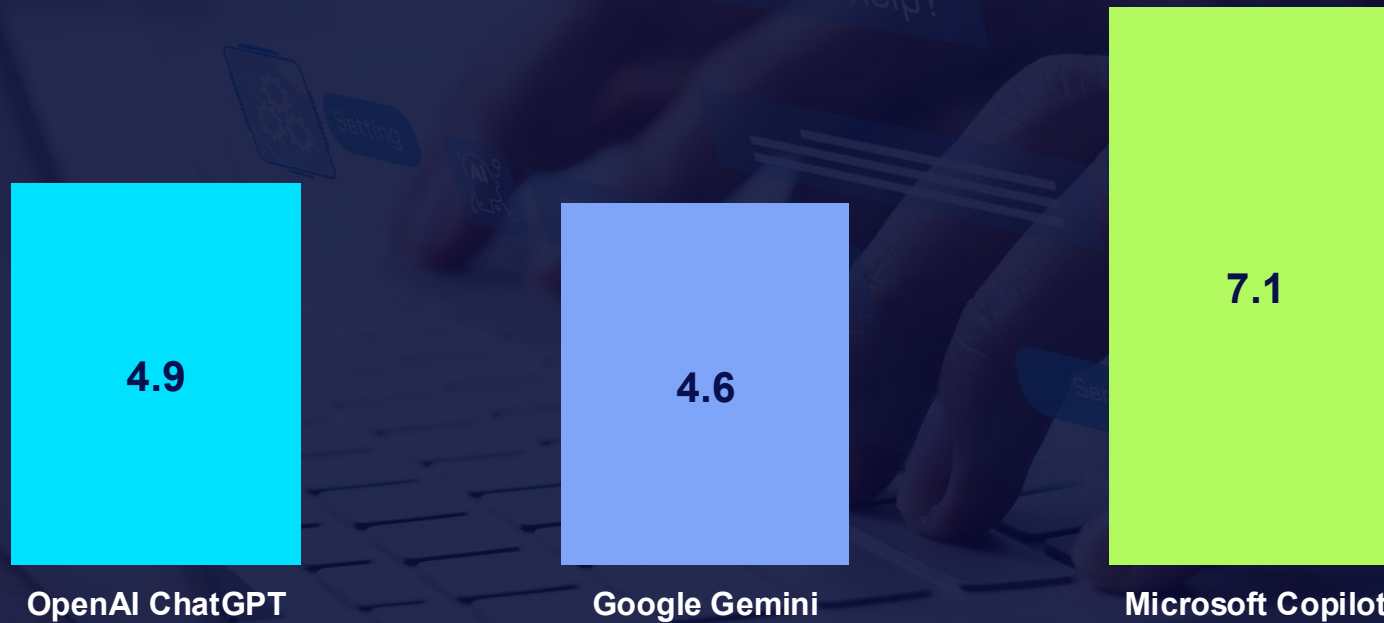
Different Paths for Your Questions



Finding the Right Question

Multi-turn Conversations Are Common Across AI Platforms, Highlighting How Users Explore And Refine Queries

Average Number of Prompts per Conversation
(March 2026)

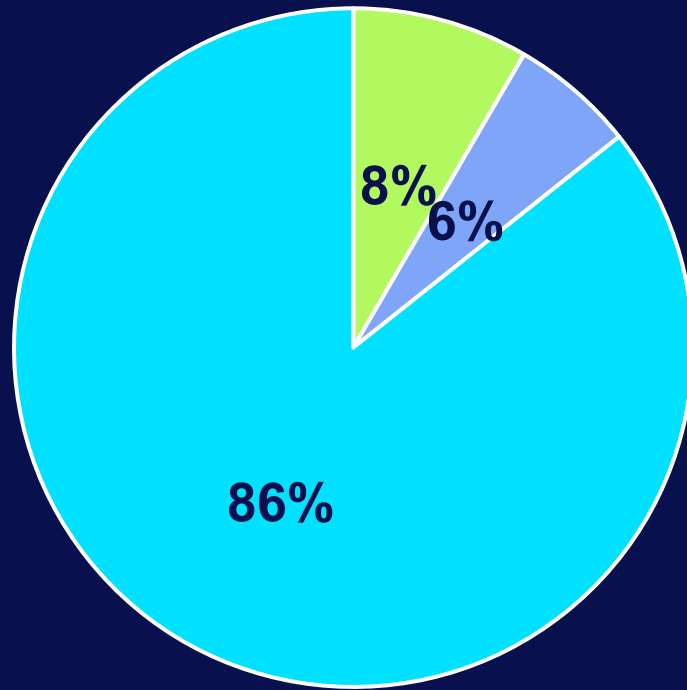


AI Prompt Shares Stay Stable Across AI Assistants

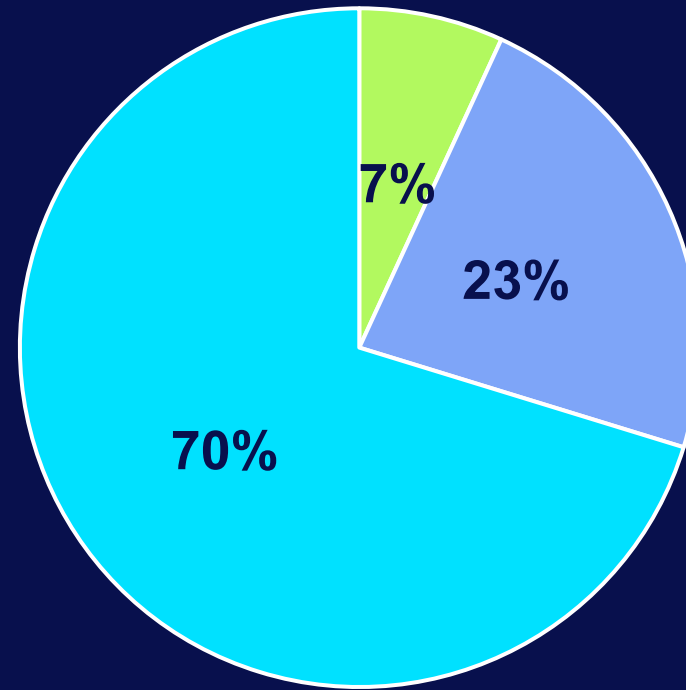
Prompt shares remain largely unchanged, reinforcing a stable competitive landscape.

Share of AI Prompt Volume by Platform

March 2025



March 2026



Copilot

Gemini

ChatGPT



Core Insights:

Prompts

Consumer Intent Surfaces Through AI Prompts

What people ask AI - and the way they articulate their needs - offers a window into genuine intent, enabling sharper targeting, stronger messaging, and better visibility for your brand within AI-generated responses.

Brand Perception Is Being Shaped in Real Time by AI Responses

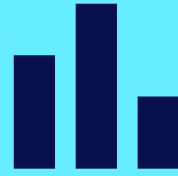
Prompt-level output analysis reveals how AI characterizes your brand right now, providing the foundation to safeguard content accuracy and steer editorial and marketing direction.

Growth and Innovation Pathways Emerge from AI Prompts

Examining trends in prompt activity sheds light on emerging needs and novel use cases, opening the door to product and campaign opportunities while gauging where AI fuels discovery and engagement.

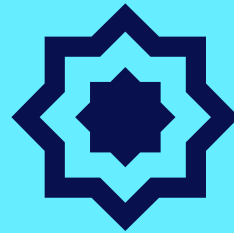


An Objective, Panel-Based Perspective on How AI Affects Platforms



Measurement Now Uncovers the Emerging Gateways of Influence

How AI search and summaries present content reveals the shifting landscape of visibility and demand, enabling you to defend current share while investing in future competitive advantage.



The Consumer Journey Grows Increasingly Accelerated, Guided, and AI-Driven

Knowing at which stages consumers turn to AI - from initial discovery through final purchase - makes it possible to focus on the decision points that matter most and align media and content accordingly.



Prompts Offer Clear Visibility Into Genuine Intent and Opportunity

Examining the questions people pose to AI - along with the responses generated - illuminates brand perception and market openings, supporting more refined targeting, narrative control, and discovery of new growth avenues.



How to Drive Impact For Your Business

Chart Your Customer Journey

Pinpoint live signals and data sources that deepen consumer engagement.

Harness AI-Powered Insight Tools

Commit resources to AI-driven platforms that enable segmentation, prediction, and real-time decisioning—boosting accuracy, speed, and overall effectiveness.

Strengthen Your Data Foundation

Bring together CRM, web analytics, mobile, and offline data to power AI systems and drive better targeting, relevance, and performance.

Deliver Tailored Consumer Experiences

Adapt interactions to reflect context, intent, and emotional cues at every relevant touchpoint, ensuring responses align with each individual consumer's needs.

Measure Reliably and Consistently

Sustain regular monitoring of trends and AI's influence on behavior and performance, allowing you to adapt and refine strategies grounded in reliable, continuous measurement.

Get in Touch



