croud

The Croud Consumer Index: The Validation Economy

How AI is reshaping discovery, trust and purchase

US Insights

Introduction

Valerie Davis

US CEO, Croud

Artificial intelligence is transforming how consumers discover brands, products and services. For the first time, recommendations are no longer shaped solely by search engines, retailers or publishers. Increasingly, they are generated by LLMs.

That changes the rules. For years, brands competed to be found. Today, they must compete to be recommended. But recommendation isn't the finish line, it's simply the invitation into consideration.

Our research shows that once an LLM recommends a brand, consumers don't immediately buy. Instead, they begin looking for evidence. They read reviews. They browse Reddit. They watch YouTube videos. They seek opinions from creators and communities. In other words, AI may introduce a brand, but people still determine whether it's worthy of trust.

We call this the **Validation Economy**: the critical space between AI recommendation and consumer action, where credibility is earned or lost.

The Croud Consumer Index is our flagship research series exploring how AI is reshaping consumer behavior and brand growth. This fourth wave draws on responses from 2,000 consumers in both the US and UK to understand how people are using LLMs throughout the purchase journey, where they turn to validate AI recommendations, and how willing they are to let AI make decisions on their behalf.

Three themes emerged.

First, the shortlist is the new shelf. Nearly three-quarters of US AI users bring LLMs into their purchase journey before they've chosen a product. As AI becomes the front door to discovery, inclusion in an LLM's recommendations is increasingly valuable. To compete, brands need to be **shortlistable**.

Second, recommendation does not equal trust. Approximately half of consumers validate AI recommendations through Amazon and retailer reviews, while others turn to creators, communities and platforms like Reddit and YouTube before making a purchase. To survive this validation moment, brands need to be consistent and verifiable across the entire digital discovery ecosystem.

Finally, consumers are prepared to delegate more than many brands realize. More than two-thirds of consumers are open to AI purchasing on their behalf but willingness to delegate depends on confidence in accuracy, data security and control. To earn the sale, brands need to be **delegatable**.

Throughout this report, we explore what these shifts mean in practice. You'll see how our AI Search Visibility work with Thorne demonstrates the importance of being discoverable by AI, why creators have become a critical layer of validation in the consumer journey, and why distinctiveness and credibility have become inseparable drivers of growth.

Recommendation gets you considered. Validation gets you chosen.

The brands that succeed in the AI era won't simply be the easiest to find. They'll be the brands consumers believe when they go looking for proof.

Valerie Davis

Contents

Executive summary: How trust is earned in AI-mediated shopping

The latest wave of the Croud Consumer Index (CCI) proves our hypothesis that AI is becoming the main shopping interface. But it's a story of behavior evolving in stages, not a single leap.

Our CCI from October 2025 shows consumers were experimenting with LLMs to discover products, explore unfamiliar brands and build confidence in their choices.

By January 2026, that experimentation had hardened into habit: an Intelligence Shift that is reshaping how brands approach discovery, creativity, performance and measurement.

Now, our latest CCI shows consumers are going a step further - happy to let AI discover and shortlist for them, but, before they buy, still looking elsewhere for human proof to validate what AI has told them.

That gap between recommendation and purchase is where this edition goes deeper, across three key themes.

1. THE AI SHORTLIST

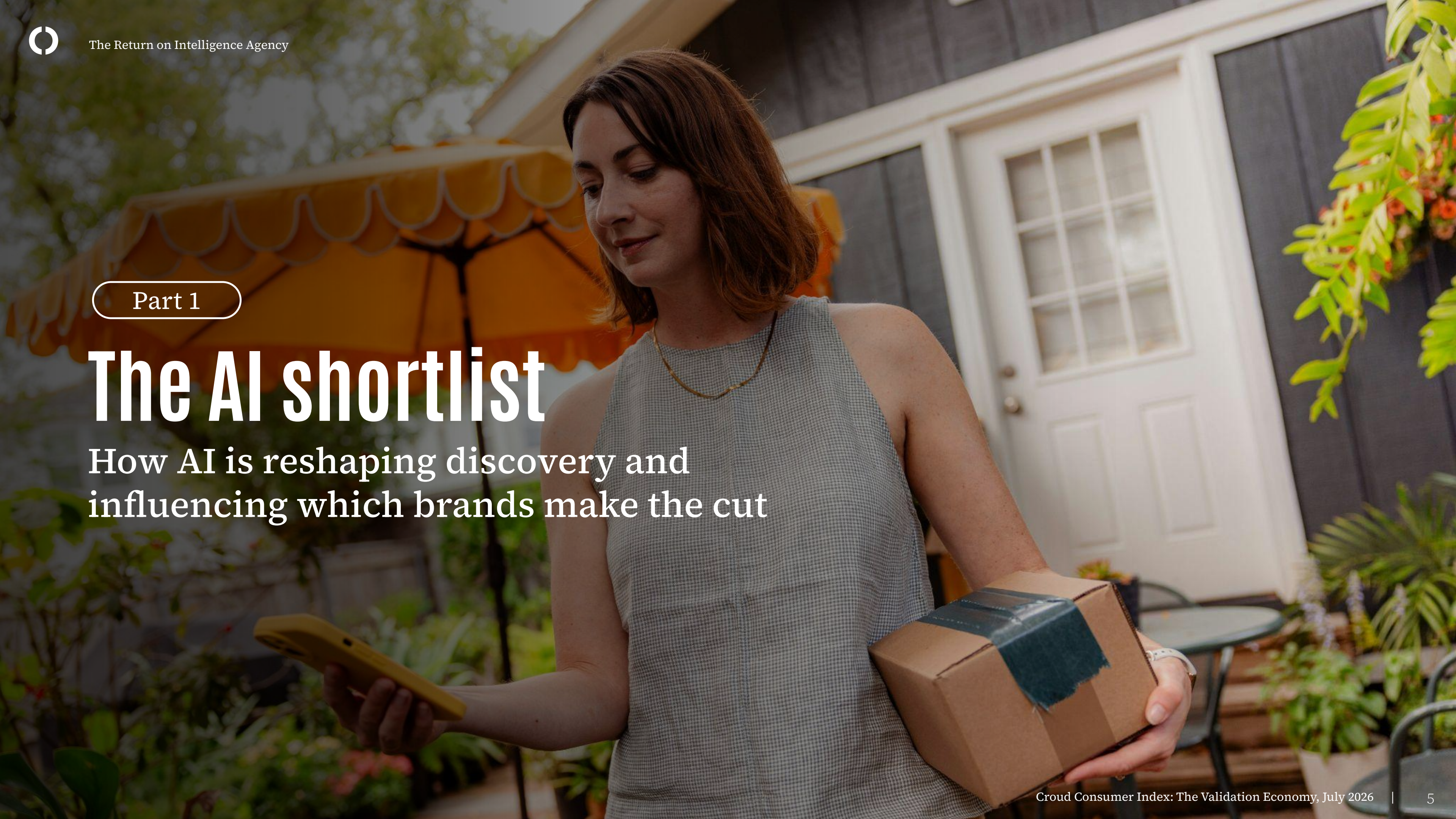
82% of US consumers use AI, and over a third (39%) already shop with it. With 73% of AI users turning to LLMs before they have chosen a product, AI is increasingly impacting the front end of the journey by helping consumers create a manageable shortlist.

2. THE VALIDATION MOMENT

After an AI recommendation, 46% of US shoppers go to Amazon and other retailer sites, while 43% turn to YouTube, in search of the human proof that AI cannot provide. This creates a new conversion layer where brand trust, human proof, content quality and channel consistency become commercially decisive.

3. THE AUTONOMOUS CONSUMER

69% of US consumers are open to AI buying on their behalf in at least one category without explicit approval. But trust conditions - such as price, category risk, accuracy, and returns - determine how much they're prepared to hand over. Brands must build the right trust conditions to unlock the agentic commerce opportunity.



Part 1

The AI shortlist

How AI is reshaping discovery and influencing which brands make the cut

LLMs have reshaped the path to purchase from search to conversation

For most of the last decade, purchase journeys began with a query: consumers typed keywords, compared results and selected a product to buy. LLMs now make conversation the starting point.

And this shift to LLM-led discovery is not limited to younger audiences. While AI shoppers are typically higher earning and more financially optimistic, adoption is just as strong amongst 35-54-year-olds as 18-34-year-olds.

Three shifts

1. **Queries → Conversations**
   Consumers refine what they want through back-and-forth dialogue.
2. **Keywords → Needs**
   They describe their goals, preferences and constraints in natural language.
3. **Results → Recommendations**
   They receive curated options before they have formed a shortlist.

The journey still ends in a purchase. But discovery now begins earlier, and brands need to influence the recommendation before the shortlist is set.

Making the LLM Shortlist

Our findings show:

01

LLM discovery is now becoming habitual, so brands must be visible, consistent, distinct and trustworthy

02

Every LLM recommendation triggers multiple validation events

03

AI users search more broadly, blending price with brand need and style cues

04

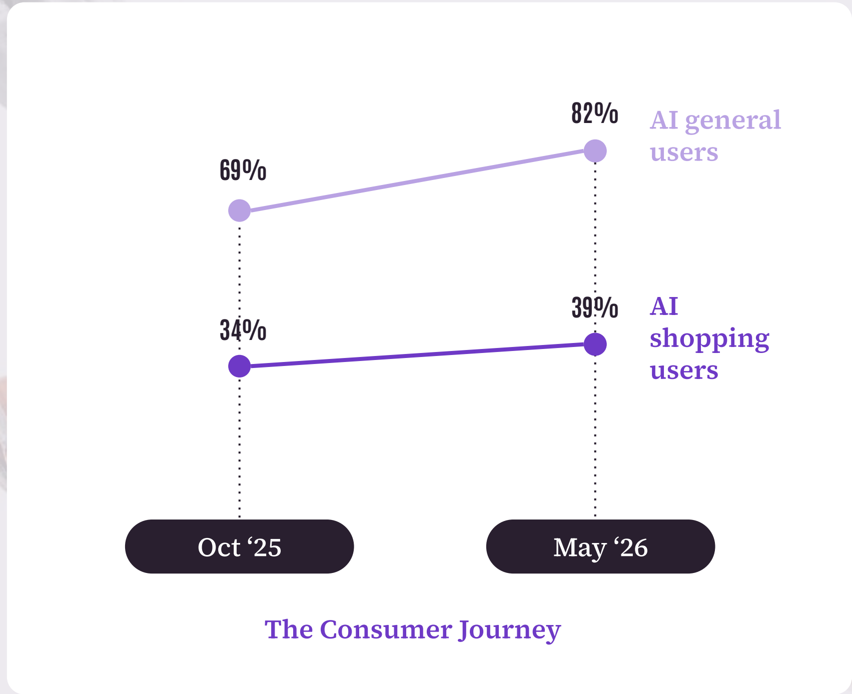
AI shapes the shortlist before the product is chosen

1. LLM discovery is becoming habitual. Visibility alone is no longer enough.

82% of US consumers already use LLMs in their daily lives, while 39% now use them during the shopping journey.

The tools are familiar and the habit is forming. What hasn't happened yet, for all consumers, is the moment it clicks as a shopping tool.

As AI use compounds, more consumers will bring it into their purchase journeys. The question for brands is not whether that transition will happen. It is whether you will be consistently visible, distinctive, and trustworthy - to both humans and machines - when it does.



AI general users – those who use LLMs for a range of tasks
AI shopping users – those who use LLMs during their consumer journey

2. Every LLM recommendation triggers multiple validation events

The purchase journey is shifting. The time consumers once gave to search and discovery is moving decisively to validation. And that is the moment the sale is now won or lost.

The brands that show up well in those moments convert. The brands that don't are shortlisted, then forgotten.

As AI usage expands,
so does the Validation Economy.

Graph shown for illustrative purposes only, not from survey data

3. AI users search more broadly, blending price with brand need and style cues

The price-to-need shift

It's not a simple move away from price. AI users search by price almost as often as non-users, but they're also more likely to describe what they want through brand, need, product and style cues.

Style and identity queries

AI users are 23% more likely to search by style or aesthetic, exploratory, identity-driven queries.

Brands with clear visual and tonal signals, not just functional descriptions, are better positioned to appear in LLM searches.

It is not a youth behavior

35–54s search by need or use case at 45%, slightly ahead of 18–34s at 42%. AI conversational search spans the full working-age population.

Age-based AI adoption assumptions will undercount the real audience.

LLM search queries

4. AI shapes the shortlist before the product is chosen

Not all AI shoppers enter the journey at the same point. Knowing where your category attracts LLM use determines which part of the experience brands need to own.

Stage 1 Invest in category-level presence, not brand-name search.

Stage 2 Structured product content wins: clear attributes, use cases, honest differentiation. LLMs surface the brands they can describe precisely, and skip the ones they can't.

Stage 3 Brand signals and social proof are decisive at this stage. Consistent brand presence across review surfaces, creator content and Google directly influences outcome.

Stage 4 Availability, price accuracy, and trust signals at checkout matter most. This is where conversion infrastructure pays off.

73%

of AI users turn to LLMs before choosing a specific product.

Stage		AI Users	Non-Users
Stage 1	When they begin thinking of shopping	38%	27%
Stage 2	Know the category but not the product yet	35%	32%
Stage 3	Know specific product but not the brand	16%	24%
Stage 4	Know brand but not the exact model or version	6%	9%
	Right before making the purchase decision	6%	9%

The AI shortlist: What this means for your media strategy

01

Audit your AI presence before you optimize it

Most brands invest in AI discoverability without knowing what LLMs currently say about them. Croud's BrandCI tool shows how your brand appears across LLMs, how you compare with competitors, and which sources shape the response - so you can fix what's missing or inaccurate and prioritize the highest-impact actions.

02

Own a need, but make value part of the story

US AI users still search by price, but they are more likely than non-users to also search by brand, need and style. Brands need to be legible across all of those entry points: what they solve, who they suit, how they look, and why they justify the spend.

03

Match your media investment to where AI use enters the funnel

LLM use does not begin at the same point in every consumer journey. Where it enters determines what kind of presence pays off. Brand building is most important early in the journey, while conversion infrastructure is most important towards the end of the journey. Know which you are planning for before you decide where to spend.

croud THORNE®

Growing AI search visibility for Thorne

"Croud helped us reshape and reset how we show up across AI search and traditional results, improving our positioning as the definitive source in our space. The mix of fresh expert content, technical upgrades, and internal alignment has changed our performance in a measurable way."

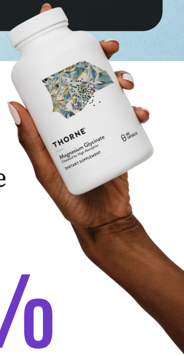
Rajiv Ragu, VP Growth - Thorne

The challenge

With search behaviors diversifying, Thorne, a leading health and wellness brand featuring science-backed supplements, was looking to reach their audiences in new ways, **beyond traditional search**. Croud's mission was to reinforce Thorne as the trusted source for answers on nutritional supplements. Leveraging a combination of BrandCI and SEOCI, Croud pinpointed the areas of focus that Thorne needed to work on to improve mention rate, overall visibility and commercial return.

The intelligence

Two of Croud's proprietary tools worked together: **BrandCI** mapped attention, citations, and visibility across AI platforms (ChatGPT, Claude, Meta, Gemini), surfacing the highest-upside categories and context focus areas. **SEOCI** applied competitive intelligence and execution governance to transform those priorities into content, schema, and technical sprints, while measuring the impact of AI visibility. Together, BrandCI set focus, and SEOCI drove how we won and proved impact.



The results

After examining and implementing these insights, Croud reshaped Thorne's overall search strategy, shifting from keyword-first planning to intent, context, and entity-led prioritization, using BrandCI and SEOCI to focus effort where AI visibility and commercial impact are highest.

As a result of Croud's work, Thorne saw incredible results in their search activity, including:

30%
increase in YoY Organic revenue

+22%
ahead of organic revenue target

66%
LLM mention rate based on BrandCI

Part 2

The validation moment

Where consumers look for proof – and trust is won or lost

US AI users validate for value, reassurance and proof, not just human reviews

In the US, AI users are validating LLM results for a wide range of reasons - looking for better prices or deals, real user experiences, confirmation the product works, reassurance they are making the right choice, and evidence of brand reputation.

The opportunity is to build proof systems that do more than reassure. Brands need validation content that helps shoppers justify the choice commercially, emotionally and practically: price confidence, real reviews, product demonstrations, clear claims and visible reputation signals.

34%

Best prices

AI users want to confirm they are getting a fair deal, not just a relevant recommendation

27%

Reassurance of choice

Validation helps shoppers feel confident they are making the right decision before they commit

23%

Brand reputation

AI users are looking for evidence of a brand's reputability

Key features of the validation moment

01

Users validate across multiple channels, with each playing a different role

02

User reviews are a critical part of the validation moment

03

AI users are more likely to scrutinise across four or more sources

04

Not all categories require as much validation

1. Users validate across multiple channels, with each playing a different role

The brands that show up with the right proof, in the right validation channel, for the right category, are best placed to convert an AI shortlist into a sale.

YouTube

43%

YouTube remains the most consistent validation channel. Usage ranges from 38% in women's casualwear to 50% in computers and laptops.

Brands need creator content that answers the questions shoppers ask after an LLM recommends.

Instagram / TikTok

35%

Instagram and TikTok are strongest where visual confidence, lifestyle fit and identity matter, but the US pattern extends beyond fashion.

Brands need content that makes the choice feel desirable and easy to validate.

Reddit

27%

Reddit plays a bigger role in the US validation journey than in the UK, with usage ranging from 23% in footwear to 31% in travel.

Brands need to know what real consumers are saying, because this is where claims get stress-tested.

2. User reviews are critical to the validation moment

Being shortlisted by AI is not the conversion. Consumers still turn to human judgement - including reviews, ratings, lived experience - to decide, validating recommendations across platforms for proof of value, reassurance and trust. Creators sit at the center of that validation moment, providing proof shoppers believe and signals machines can read. Three key actions for brands are:

1 Brief creators for two audiences - humans and machines

Brief creators to develop content that answers real shopper questions while giving LLMs credible, specific information to draw from.

2 Strengthen retailer reviews

With Amazon and retailer reviews being the most used validation source among US AI Users, it's essential to build review volume and quality, respond to recurring concerns and keep product information accurate and current.

3 Prioritize peer-led platforms like Reddit

With over a quarter of US AI users validating through Reddit or other forums, ensuring visibility and consistency across these platforms is vital.

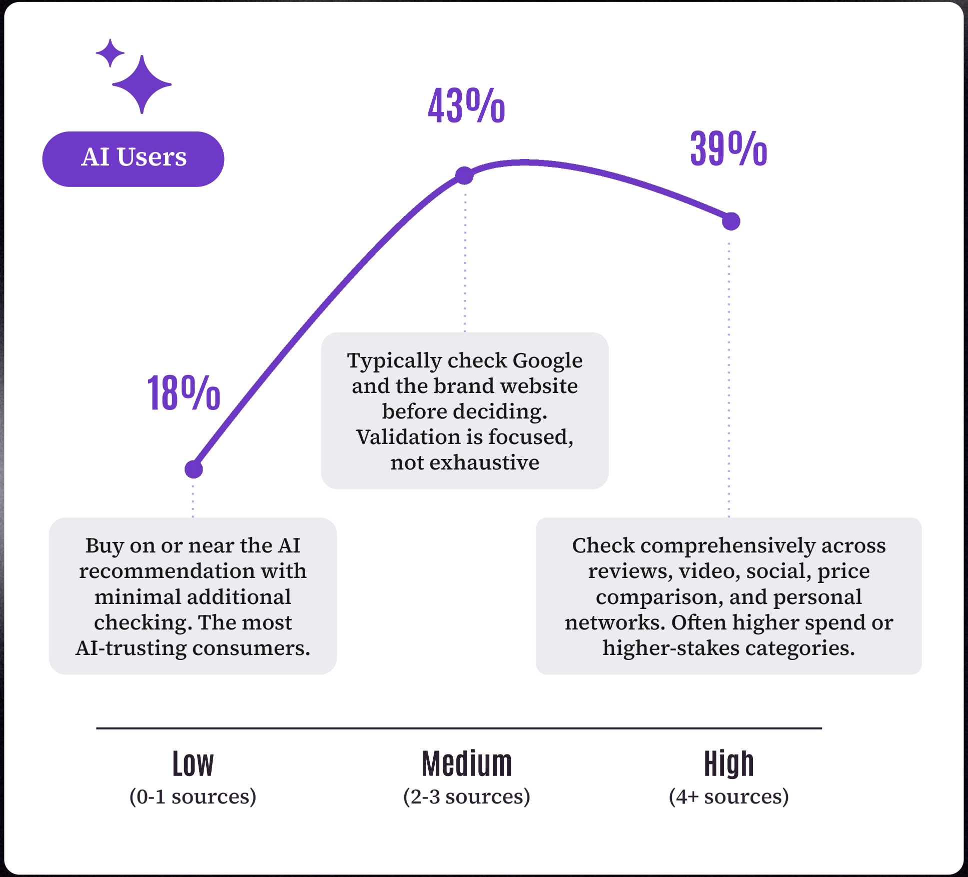
Ensure consistency across platforms

With consumers validating across multiple sources, consistency is key. Ensure information across LLMs, creator content, retailer pages and owned channels is consistent, to avoid conflicting descriptions that create doubt at the point of validation.

3. US AI users are more likely than non-users to validate across four or more sources

Almost 40% of AI users check four or more sources - 38% higher than amongst non-users. This means AI discoverability only creates value if the brand can also withstand the validation journey that follows.

For brands, the commercial risk is not just being absent from AI. It is being present in AI, then weak or inconsistent across the surfaces consumers check next: retailer reviews, YouTube, Reddit, price comparison sites, brand sites and social content.



4. Not all categories require as much validation

How much of the post-AI journey a brand needs to own is a category question, not a general one. In the US, fashion needs lighter but still visible reassurance, while financial products require a deeper validation system across expert, peer and brand-owned sources.

Fashion & clothing: LOW validation intensity

23% of AI users say they **must** check beyond AI before buying fashion, the lowest of any category

25% of high-intensity validators still seek further reassurance before buying fashion

+56% AI-assisted fashion journeys drive higher spend: $213 among AI users versus $136 among non-users - a 56% premium

In fashion, AI can get consumers close to the sale, but reassurance still matters around fit, quality, returns and social proof.

Financial products: HIGH validation intensity

34% of AI users say they **must** check beyond AI for financial products, 47% more than the fashion figure

42% of high-intensity validators need further reassurance before choosing a financial product

27% of non-users would not use AI to discover financial products (2.25x more rejection than AI users), showing the trust barrier remains much higher outside the AI user audience

In financial products, the validation chain remains the purchase process. Brands need proof across every channel a consumer might check.

The validation moment: What this means for your media strategy

01

Treat your brand website as a validation destination

Most brand websites are built to convert traffic that arrives ready to buy. The consumer arriving from an AI recommendation is not ready to buy yet, but they are ready to check.

Product pages, review visibility, claims, pricing confidence and returns reassurance all need to be designed for that intent. Brands that make this shift turn their own site into a closing tool.

02

Build proof content across creator, retailer and peer channels

In the US, validation is spread across platforms. AI users check YouTube, Amazon and retailer reviews, Reddit, social and brand-owned sources before deciding.

The opportunity is to brief validation content as a connected proof system. Croud's influencer offering helps brands find and brief the right creators for credible demonstrations, reviews and content, backed by retailer proof and peer discussion.

03

Design the right proof system for your category

Validation needs differ by category, so brands should not use the same proof strategy everywhere.

Lower-intensity categories need practical reassurance around fit, quality, availability, returns and social proof. Higher-intensity categories need deeper validation across expert guidance, peer discussion, comparisons, demonstrations and brand-owned information.

Creators as validators: Bridging the gap between brands being cited and being believed.

Liv Wedderburn

Head of Influence, Born Social

Hypothesis

We've previously spoken about the Creator Economy as a brand's "proof of life": the verifiable human layer that allows brands to use machines for scale while preserving humanity through creators. The Validation Economy findings sharpen that thinking further. You can't add a human layer once and expect it to sustain your wider AI content mix. Creator content is now doing double duty: fuelling LLMs with the structured, specific information they cite and helping brands answer utility-led queries, while also standing up to scrutiny when 43% of AI users turn to YouTube and 35% go to social media to verify what AI has told them.

Insight

Distinctive creator content is what earns a brand the right to be both cited and believed. Generic, campaign-style content gives LLMs nothing precise to cite, risks being lost among competitors in the same space, and gives consumers little to trust when they validate what AI has told them.

Even when created by a human, it can still feel synthetic because it lacks the specificity and distinctiveness needed to stand out from a sea of outdated or competing content.

Content rooted in real use, opinion, and specificity gives consumers reassurance and extends its value well beyond the initial campaign.

Trust is the currency creators trade in, and that value compounds over time. A brand can be surfaced by an LLM and still lose the sale if what consumers find next on YouTube or TikTok does not hold up. Brands therefore need to identify where trust breaks down and use creators to fill those gaps. Creators provide the verifiable human proof that machines cannot replicate and consumers actively seek when validating a recommendation.

Consistency is what makes that trust durable across an increasingly fragmented journey. AI users are not validating only once: the data suggests they return to trusted sources and consult up to three additional ones before buying. A brand's creator content, social presence and AI visibility must all reinforce the same narrative. The more closely connected they are, the more consistently the brand appears at every validation point — and the more likely consumers are to convert.

In a fragmented media landscape, coherence across touchpoints has never mattered more. A brand that feels credible in one place but thin in another can still lose the sale.

Impact

The brief for creator content has changed even where the channel hasn't.

Content commissioned for reach now needs to be built for citation and cross-examination too.

Brands that still treat creators as a one-off campaign tool — rather than an always-on source of distinctive, trustworthy proof — may get shortlisted by LLMs. But if there's no human face to confirm the brand is worth it, consumers who are looking to validate quickly move on. Over time, that erodes the brand's ability to be cited at all.

Born Creator Community (BCC)

BCC is our creator-powered content engine, designed to help brands produce authentic, culturally fluent content at the speed and scale social demands - for use across social, paid, CRM, web, and beyond.

Combining a globally vetted creator community with strategic oversight, AI-enabled workflows and perpetual usage rights, BCC transforms creators from one-off campaign partners into an always-on creative infrastructure.

To find out more about how BCC can support your brand, get in touch: james.wilde@croud.com.

Part 3

The autonomous consumer

How much of the purchase journey will consumers hand over to AI

Our findings show:

01

Consumers are increasingly open to AI making purchases for them

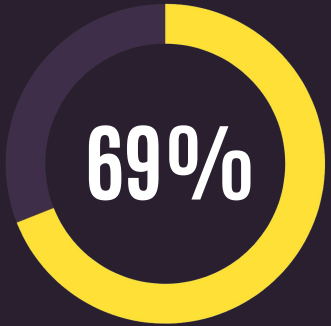
02

The category and approval mechanism both determine the opportunity

03

Most AI commerce is below $100 and raising that threshold is earnt through brand trust

1. Consumers are increasingly open to AI making purchases for them

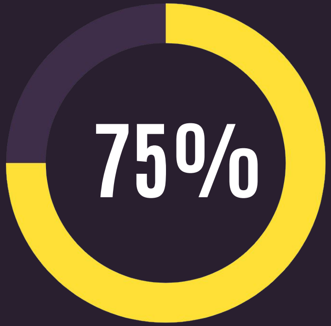


of US consumers are open to AI buying without approval, in **at least one category**

As AI familiarity grows, so does the agentic commerce opportunity.

of consumers are comfortable with AI purchasing across 3+ categories without approval

1 in 2 consumers are primed for agentic AI infrastructure.



of consumers would use instant checkout (AI with their approval) across at least one category

The with-approval market is larger and more immediate.

The brands that build for instant checkout today are building the trust that makes autonomous purchasing possible tomorrow.

2. The category and approval mechanism both determine the opportunity

Across every category, instant checkout with approval is more widely accepted than fully autonomous agent purchasing. The approval mechanism is the near-term commercial unlock: it gives consumers speed without removing control.

Household essentials, groceries, clothing under $50, gifts and health/wellness all show meaningful instant checkout openness. For agent purchasing, subscriptions and household essentials remain strong, but clothing under $50 has the strongest AI user uplift, showing that low-risk, low-ticket categories can move quickly when the experience feels controlled.

Openness to instant checkout & agentic commerce across categories

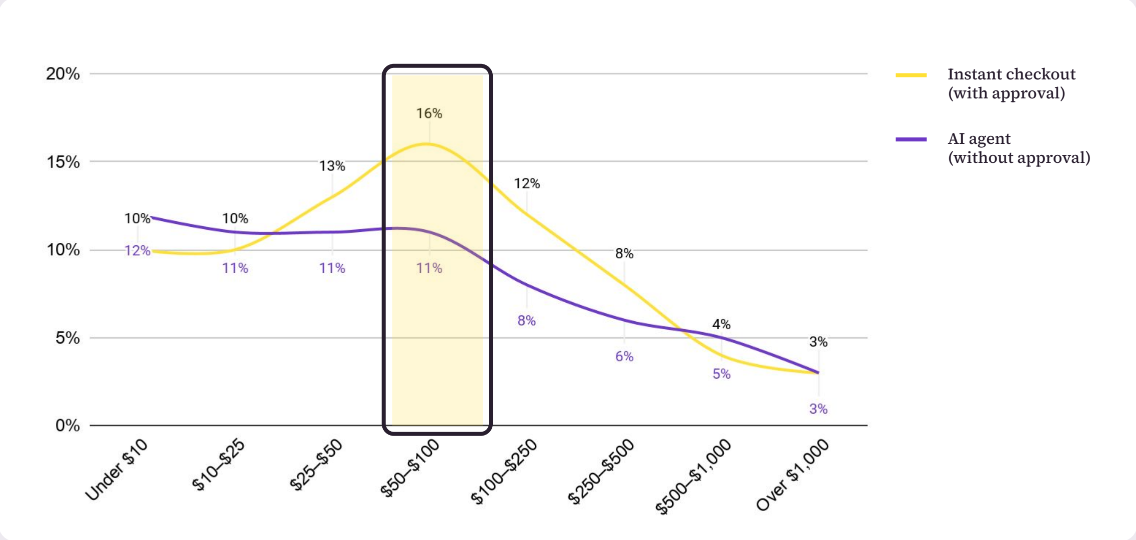
(AI users & non-users)

Category	Instant checkout, total	AI agent, total
Household essentials	40%	26%
Groceries	41%	22%
Clothing under $50	37%	23%
Gifts	37%	24%
Travel	34%	26%
Subscriptions	35%	27%
Electronics	34%	25%
Insurance renewals	31%	24%
New insurance	31%	21%
Health / wellness	37%	23%

High — Low

Conditional formatting within column

3. Most AI commerce is below $100 and raising that threshold is earnt through brand trust



Sub-$100 AI commerce is open now and brands should be optimizing for it.

Above $100, consumer willingness drops sharply, the brief shifts to building the trust infrastructure that raises the ceiling: reviews, transparent pricing, and frictionless returns. The brands that invest in that now will own a larger share of AI commerce as spend confidence grows.

23%

of AI users are not comfortable with instant checkout at any price

12%

of AI users are comfortable spending $250–$500 via instant checkout

19%

would not be comfortable with an agent at any price

The delegator profile

50% of AI Users would delegate 3+ categories to an AI agent

When compared with AI users who wouldn't delegate to an AI agent...

40% of AI users who would delegate to an AI agent are aged 18–34, double the amount of those who wouldn't delegate

58% are male, 25% higher than those who wouldn't delegate

48% are financially optimistic - 44% higher than those who wouldn't delegate

3+ category delegators are **NOT** significantly wealthier than the general population. The delegation mindset is driven by attitude and AI familiarity, not affluence.

Accuracy, data security, easy returns and consumer-led controls build trust in autonomous purchasing

What would unlock delegation through an AI agent:

20%

100% accuracy

Build the first delegation moment carefully, early experience sets the trust standard for everything that follows.

20%

Data security

Invest in visible, explicit data protection. This barrier does not erode with time; it has to be designed out.

23%

Easy returns

Make your returns policy a frontline commercial asset in agentic channels, not a terms and conditions footnote.

20%

Control and rules

Give consumers the ability to set their own limits. Brands that build customisable guardrails into the experience will convert the hesitant majority.

The autonomous consumer: What this means for your media strategy

01

Identify which of your categories already have consumer permission

In the US, instant checkout with approval is the bigger near-term opportunity, especially across routine, lower-risk and lower-ticket categories.

The job is to build checkout experiences around speed, reassurance and control.

02

Treat returns policy and data security as conversion levers

These are commercial infrastructure, not just customer service issues.

For AI-assisted or agentic commerce, easy returns, visible data protection and user-set rules need to be clear before the point of purchase.

03

Design for the AI delegator now, the rest of the market follows

Half of AI users would delegate three or more categories to an AI agent, so the audience already exists.

But the larger opportunity is still assisted commerce. Approval-led experiences can build the trust that makes autonomous purchasing easier tomorrow.

Equity and evidence: The brand building model for the validation economy

Callum McCahon

Chief Strategy Officer, Croud

Our new Consumer Index makes one thing hard to ignore. Getting recommended by an AI tool is not the moment a brand wins the sale. It is the moment a new phase of work begins.

Our report calls this the Validation Economy. When an LLM shortlists a brand, 43% of AI users go and check on YouTube, 35% check Instagram or TikTok, and 19% ask a different AI tool to validate what the first one said. Being shortlisted is not the conversion event. What happens next decides whether the brand gets bought.

That splits brand building into two jobs. Getting picked in the first place, and getting believed once someone goes looking for proof. We think about these as *equity* and *evidence*, and increasingly, both have to speak to humans and machines at once.

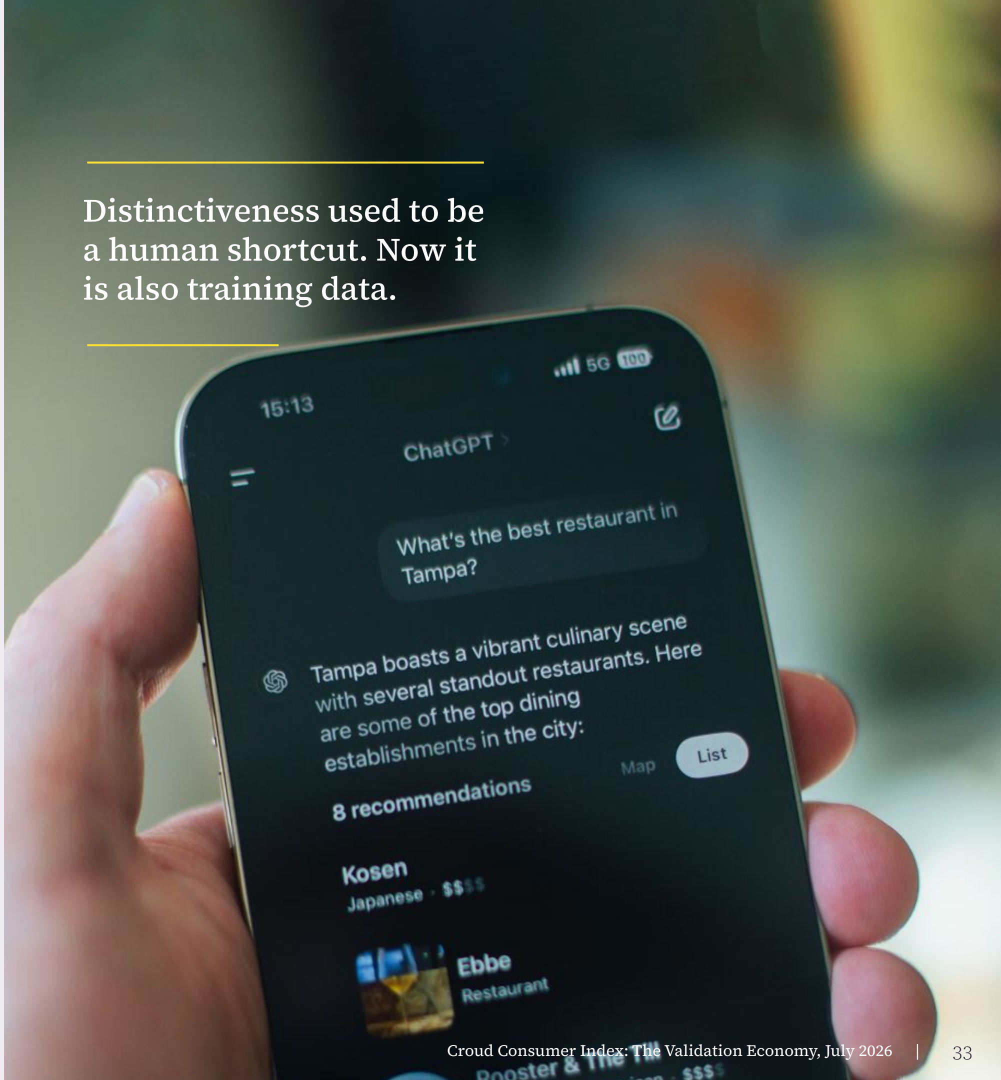
Equity: what gets you picked

Equity is distinctiveness, fame, the associations that predispose someone toward a brand before they have done any active thinking about it. What is new is that LLMs are trained on the same signals that build equity in the offline world: mentions, associations, the language people use to describe a category.

The report shows this already playing out. Non-AI users still lead on price-based search by 8pp.
AI users have moved on: 40% search by need or use case, and they are 5pp more likely to search by style or aesthetic. The query has shifted from “what’s cheapest” to “what fits.” A brand associated with a need or an identity is the brand an LLM can describe precisely. A brand that has only ever competed on price has nothing left to attach to.

There’s a warning here too. 35% of AI users now arrive already knowing the category but not the product, up from 31% in under a year, meaning the habitual, repeat-purchase choice doesn’t happen by default. Equity built on loyalty doesn’t automatically transfer to a model with no memory of past purchases. It only knows what has been said about you, publicly, at scale.

Distinctiveness used to be a human shortcut. Now it is also training data.



Evidence: what gets you believed

Evidence is the proof layer, and it now has two audiences reading it at once. A human uses it to decide whether to trust the recommendation. A model uses the same material to decide what to cite next time.

When AI users were asked what they're looking for once they leave the AI conversation, the answer wasn't more product information.

It was proof another human had actually checked it. 33%* want real user experiences and honest reviews, ranked above price, above product detail, even above scam checks.

That's what's happening on YouTube and social when people go there after a recommendation. It's the evidence stage of the journey, playing out on channels mostly built and budgeted for awareness.

Scrutiny doesn't fall away as trust in AI grows either. The report's validation intensity data shows AI users checking across as many sources as sceptics do, not fewer. A brand with no real footprint of reviews or creator content loses exactly the people who were closest to converting, because they're the ones checking hardest.

** Croud Consumer Index: The Validation Economy, July 2026*

Why the two have to move together

Equity without evidence gets you recommended and then abandoned at the checking stage. Evidence without equity makes you one of several credible options with nothing making you the obvious one.

The report's category data makes the point well. In fashion, only 23% say they need to check beyond AI before buying, the lowest validation intensity of any category measured, equity doing the heavy lifting. In financial products, 34% insist on checking further, almost 50% more than the fashion figure. No amount of distinctiveness closes that gap alone. The real brief is knowing which one your category leans on, not applying both evenly everywhere.

What this means in practice

Equity work means investing in category and need-level presence, not just brand name search, being describable by an AI in relation to a problem someone has.

Evidence work means treating reviews, creator content, and YouTube as commercial infrastructure rather than top-of-funnel afterthoughts. The same review that convinces a hesitant shopper is the material a model draws on to describe the brand next time.

Consistency ties both together. AI users are validating across multiple sources, so a gap between what a model says and what a review shows is exactly the kind of thing a careful validator now notices.

Brand building hasn't got more complicated. It's just started answering to two audiences instead of one, and for now, they're asking to be convinced by the same kind of proof.

Conclusion

Our latest Croud Consumer Index shows that consumers are increasingly willing to let AI help them discover and shortlist, but before they buy, they still look elsewhere for validation, for the human proof that AI can't provide. And yet openness to agentic commerce is growing. Once trust is earned, shoppers are increasingly open to delegating the purchase itself. Across all three shifts, one truth holds: visibility gets brands shortlisted, but consistency and credibility seal the deal.

1. The AI shortlist: Be shortlistable

LLMs now help shape the shortlist before consumers have formed a preference. The brands that win this stage are the ones AI can describe precisely, so invest in structured product content built around clear attributes, real use cases and honest differentiation.

2. The validation moment: Be verifiable

Every LLM recommendation triggers a validation moment. Consumers cross-check multiple sources, so proof can't live in just one place. Brief validation content as a connected system - to demonstrate, reassure, and prove credibility to shoppers.

3. The autonomous consumer: Be delegatable

Shoppers are more willing to hand purchasing to AI than many assume, and instant checkout with approval is the nearer-term opportunity. Build for assisted checkout now, focusing on areas like accuracy, data security, and returns, to build the trust conditions to enable autonomous purchasing in the future.

Valerie Davis

US CEO, Croud

“The brands that succeed in the AI era won't simply be the easiest to find. They'll be the brands consumers believe when they go looking for proof.”

About Croud

Croud is a global media, creative and data agency that delivers a return on intelligence. We have a proven track record of delivering returns that compound over time, driven by our data-led brand and performance heritage, advanced technologies and global talent.

We apply innovative intelligence across our capabilities, including brand planning, strategy, integrated media, retail media, social, creative and data. These strengths have been further enhanced through key acquisitions in creative and social with Born Social, advanced analytics with MetaGeni, and luxury marketing. Our core tools for media and creative intelligence sit within CroudOS, our AI-powered proprietary operating system. Beyond this platform, we have advanced AI-driven technologies spanning data analytics, automation, effectiveness and predictive modelling.

Founded in 2011 with a mission to reinvent the agency model, we combine more than 600 in-house digital experts with a global, on-demand network of 2,900 marketing specialists. This agile, scalable model gives us more time to understand our clients' businesses and deliver truly incremental growth.

We are backed by private equity investor ECI Partners. Our Chairman is Steve King, who joined in 2025 from Publicis Groupe, where he was Global COO.

Croud's clients include Chime, Ford, Guinness, ITV, Timberland and White Stuff.

Partnering with Croud

Croud's proprietary BrandCI tool can reveal how your brand is perceived across LLMs versus the competition, providing actionable insights to help you get ahead in the AI era. Whether you need support with engineering discoverability or predictive measurement, we turn deep consumer insight into your ultimate strategic advantage.

Interested in learning more about how Croud can unlock growth for your business?

Get in touch today:

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Our research partner & methodology

About our research partner

ImpactSense is a strategic insight consultancy that helps close the gap between insight and action. Combining research expertise with creative thinking and practical tools to help brands truly understand people and turn that understanding into real business impact.

impactsense™

About the latest Croud Consumer Index

The Croud Consumer Index is Croud's flagship research series tracking how AI is reshaping consumer behaviour and brand growth.

For this latest wave, we surveyed 2,000 consumers in the US and 2,000 in the UK who are nationally representative in terms of age and gender. This report focuses purely on the US data, where 39% were AI users and 61% non-users.

We used targeted questions designed to uncover what happens after shoppers receive an AI recommendation. The findings provide new insights to brands, helping them navigate the challenges and opportunities of this fast-moving landscape.

Total sample: 4,000

UK - 2,000

US - 2,000

US only data is used throughout this report

Nationally representative on age and gender croud