

THE MEASURE REPORT



20
25

NEW TRENDS ON HOW AI AND SOCIAL COMMERCE
ARE RESHAPING CONSUMER BEHAVIOR

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The New Consumer Reality

There is a lot of discussion around how new generative AI systems may be changing the search landscape. The reality is that consumers are not choosing between AI and search but instead they are becoming sophisticated platform experts. While the tech industry debates whether ChatGPT and similar applications will replace Search, actual consumer behavior tells a more nuanced story.

Through analysis of **142,965 ChatGPT conversations**, **86,990 search queries**, and comprehensive examination of **800,000 TikTok sessions** including **1,200 actual purchases**, we're documenting the emergence of research patterns that span multiple platforms in ways traditional marketing has never had to consider.

Our data analysis finds that over **32% of searches** that occur after AI conversations show clear connections to those prior discussions, revealing sophisticated cross-platform research workflows that traditional attribution models completely miss.

Beyond search and into social commerce, TikTok is reshaping the way people discover, consider, and purchase products. Unlike traditional ecommerce, where users arrive with clear intent, TikTok shopping often begins with serendipitous content and unfolds within highly engaged sessions. TikTok has rapidly evolved from a platform for entertainment into a marketplace where discovery and commerce are tightly linked.

By examining sessions with purchase activity, the data shows a **2x increase in search activity** and a **6% increase in video activity**. Additionally, **34% of sessions** show a strong direct content-to-purchase connection.

This isn't just about technology adoption, it's about a generation of consumers who are becoming expert researchers across multiple behavioral modes, and they're creating opportunities for brands smart enough to understand how they actually behave.

METHODOLOGY

This analysis examines real behavioral data from **142,965 ChatGPT conversations** (representing over three million total prompts), **86,990 search queries**, and **27,947 cross-platform sessions** from 3,458 individuals.

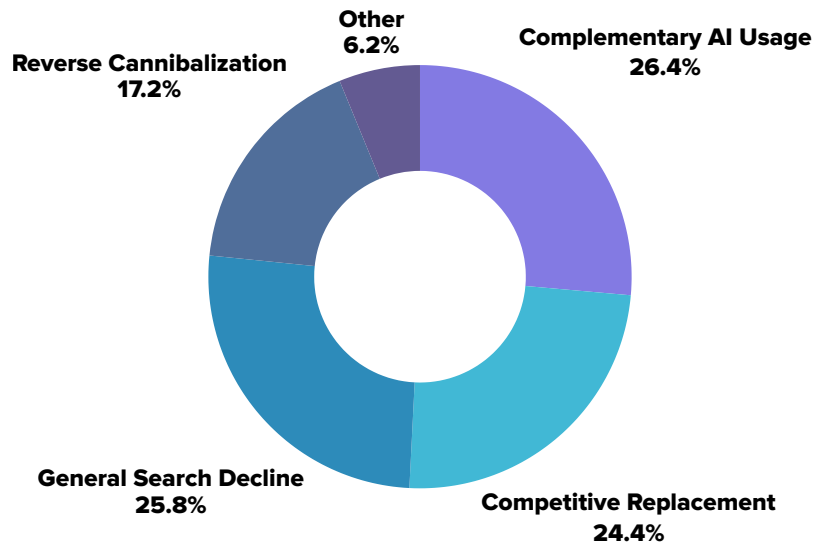
ChatGPT sessions were analyzed using a sophisticated semantic classification to understand the topic, use case and commercial relevance.

Search relatedness analysis was conducted by examining search within one-hour post ChatGPT sessions. A semantic classification was used to help determine the degree of relatedness. Search included traditional search and search across TikTok, Facebook and Instagram.

TikTok data was processed to include a large-scale session analysis of over **800,000 total sessions** including approximately **1,200 purchase sessions** across over 4,500 individuals. Sessions were determined using **15-minute inactivity gap boundaries**. For behavioral analysis, **purchase sessions** were analyzed alongside regular sessions. For content relatedness analysis, purchase sessions were analyzed to understand successful conversion patterns rather than general platform usage. This approach reveals consumption-purchase co-occurrence patterns.

Data represents data collection between January 2025 and June 2025 across the Measure community.

THE GREAT PLATFORM SPLIT



CONSUMER BEHAVIOR PATTERNS RESHAPING YOUR MARKET

Rather than the winner-take-all scenario many predicted, consumers are dividing into four distinct behavioral patterns that reveal the true complexity of the AI-search relationship:

Complementary Users

26.4% are expanding their research toolkit. They use ChatGPT for complex reasoning and Search for verification, treating AI as additive rather than replacement technology.

These users represent the sophisticated research segment that brands need to serve across multiple touchpoints.

Competitive Replacement Users

24.4% are directly substituting ChatGPT for some Search activity. They've found specific use cases where AI provides better results than traditional search.

For brands, this means ensuring visibility in AI-generated responses becomes as important as search engine optimization.

General Decline Users

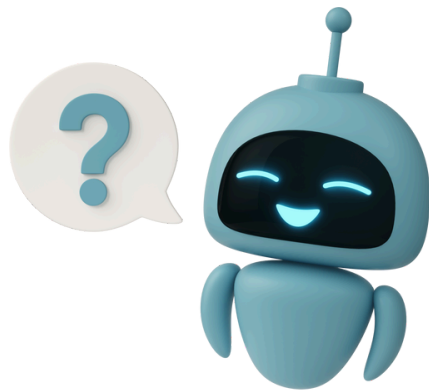
25.8% are **reducing activity on both platforms**. These users decrease both ChatGPT conversations and Search, suggesting broader shifts in information discovery beyond simple platform substitution.

Reverse Cannibalization Users

17.2% saw a reduction in ChatGPT usage and had increases in Search. These users may have experimented with AI but still largely use traditional search and may be early on in their use of multiple platforms.

The 2% difference between complementary and competitive users represents one of the most significant strategic opportunities in digital marketing, the market is essentially split down the middle on how to integrate these tools.

COMMERCIAL INTENT IN AI CONVERSATIONS



When we analyzed commercial intent across **142,965** ChatGPT conversations, clear purchasing patterns emerged. More than one in five conversations (**21.6%**) demonstrate some degree of commercial intent, but they break into two distinct categories that require different marketing approaches.

HIGH COMMERCIAL INTENT (7.1%)

These conversations show immediate purchase consideration with clear buying signals. Users are making active purchasing decisions, comparing prices, and selecting specific products.

"what's the best dividend stock to buy"
Real Investor

"protien coffee low sugar powder at target" Target Shopper

"I'm looking for a hotel that's closest to the la convention center" Business Traveller

High intent conversations are characterised by specific product requests, direct buying language, timing needs, and price/value decision-making context.

Business Finance dominates this category, representing **34%** of all high commercial intent conversations.

MEDIUM COMMERCIAL INTENT (14.4%)

These typically represent the research phase of purchase consideration including brand research, category exploration, and pre-purchase education.

This segment forms two-thirds of all commercial conversations and increasingly shows cross-platform verification patterns.

"I need some high protein foods what should i get?" Foodie

"If I get a 3rd party thermostat how do I program it" Smart Shopper

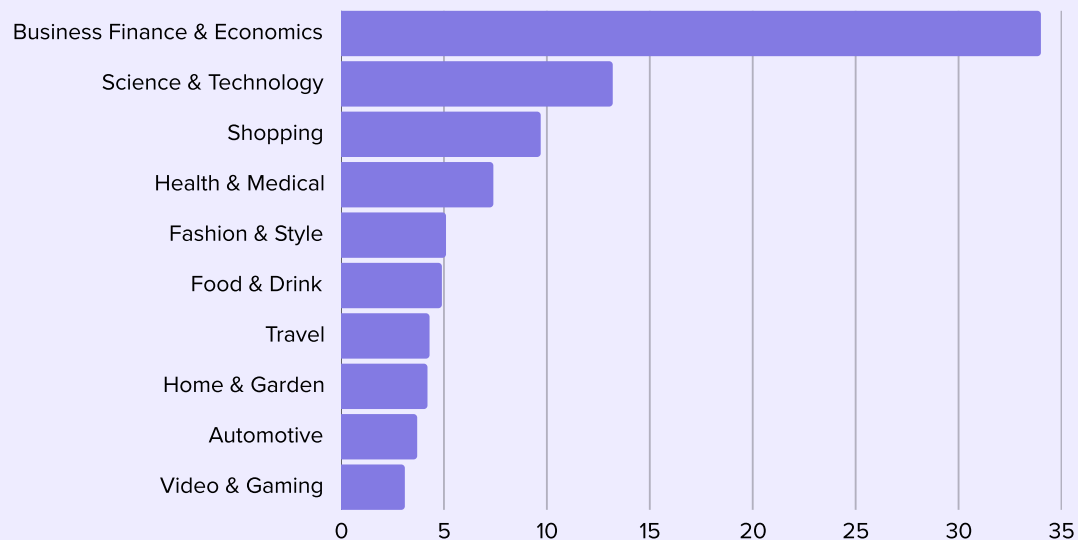
"Are TGI Fridays, applebees salads processed or unhealthy" Health Conscious Consumer

Medium intent signals include comparison requests, educational framing, and research-oriented language.

These conversations often lead to follow-up searches as users verify AI recommendations through traditional search channels.

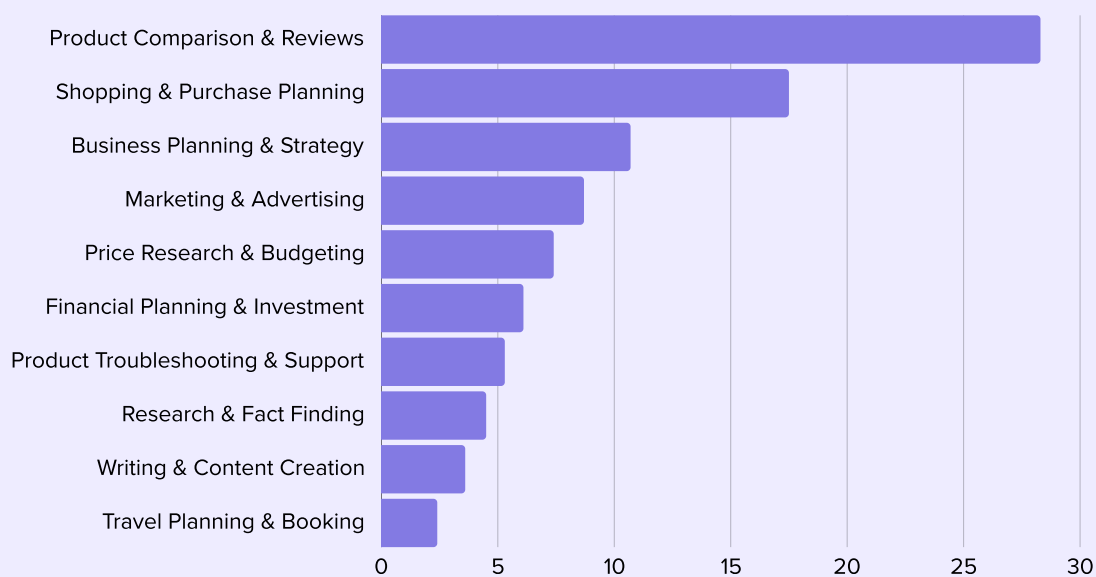
HIGH COMMERCIAL INTENT BY TOPIC

Of all conversations with high commercial intent, **34%** were related to business finance and economics. Shopping ranked third with **9.7%** of all conversations with a high commercial intent.



HIGH COMMERCIAL INTENT BY USE CASE

Twenty-eight percent of high commercial intent conversations were about product comparison and reviews. Shopping and purchase planning ranked second with **17.5%**. These use cases together indicate a strong use of GenAI for product and shopping.

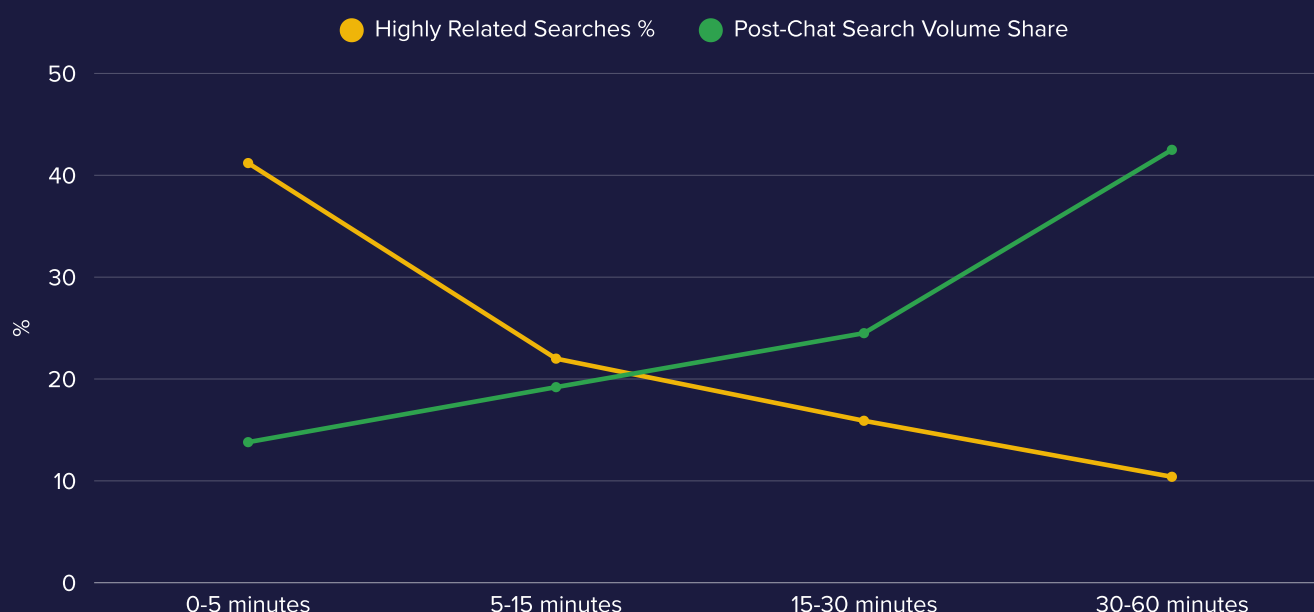


SEARCH RELATEDNESS

Search and Generative AI is intermingled, thus the importance of understanding what happens after a ChatGPT session. Specifically we looked at searches that happened within an hour after a session across Google, TikTok, YouTube, Facebook and Instagram to try and understand the level of relatedness to the initial chat prompt.

It becomes apparent that search that happens within five minutes of a ChatGPT session scores highest in relatedness with over 41% being highly related.

Platform	% of Searches	Any Relatedness Level	Highly Related
Google Search	64.2%	38.9%	23.6%
TikTok	25.2%	18.3%	7.9%
YouTube	6.8%	23.4%	11.1%
Facebook	3.7%	29.4%	9.6%
Instagram	0.1%	22.8%	10.9%



Social Commerce Gets Sophisticated

Our comprehensive analysis of over **800,000 TikTok sessions** and **~1,200 TikTok purchase sessions** establishes measurable behavioral signatures that distinguish purchase sessions from regular platform usage.

The data reveals consistent patterns in engagement intensity, content interaction, and temporal distribution that provide actionable intelligence for platform optimization, content strategy, and user experience design.

Four trends were defined:

01

Behavioural Differentiation

Purchase sessions demonstrate consistent, measurable behavioural patterns. Our data revealed 70% of purchase sessions showing some measurable content influence with 25% overall higher engagement intensity.

02

Category Specificity

Distinct influence patterns by product category indicate need for tailored optimisation approaches.

03

Generation Awareness

Age-specific behavioural intensification patterns suggest opportunities for demographic-targeted strategies.

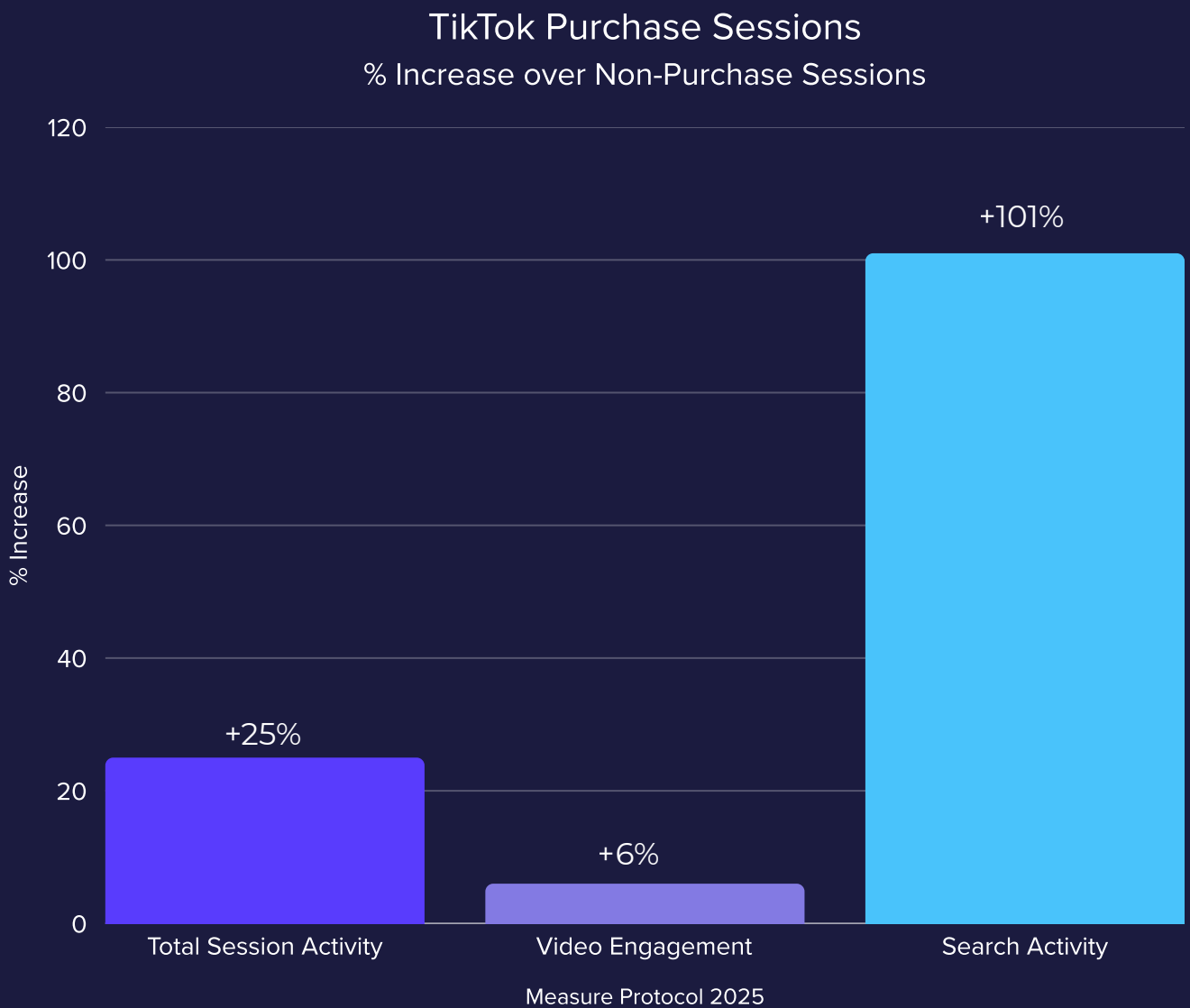
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Timeline Distribution

Purchase timing analysis reveals distributed conversion patterns throughout sessions, with 51% occurring in the last session tercile.

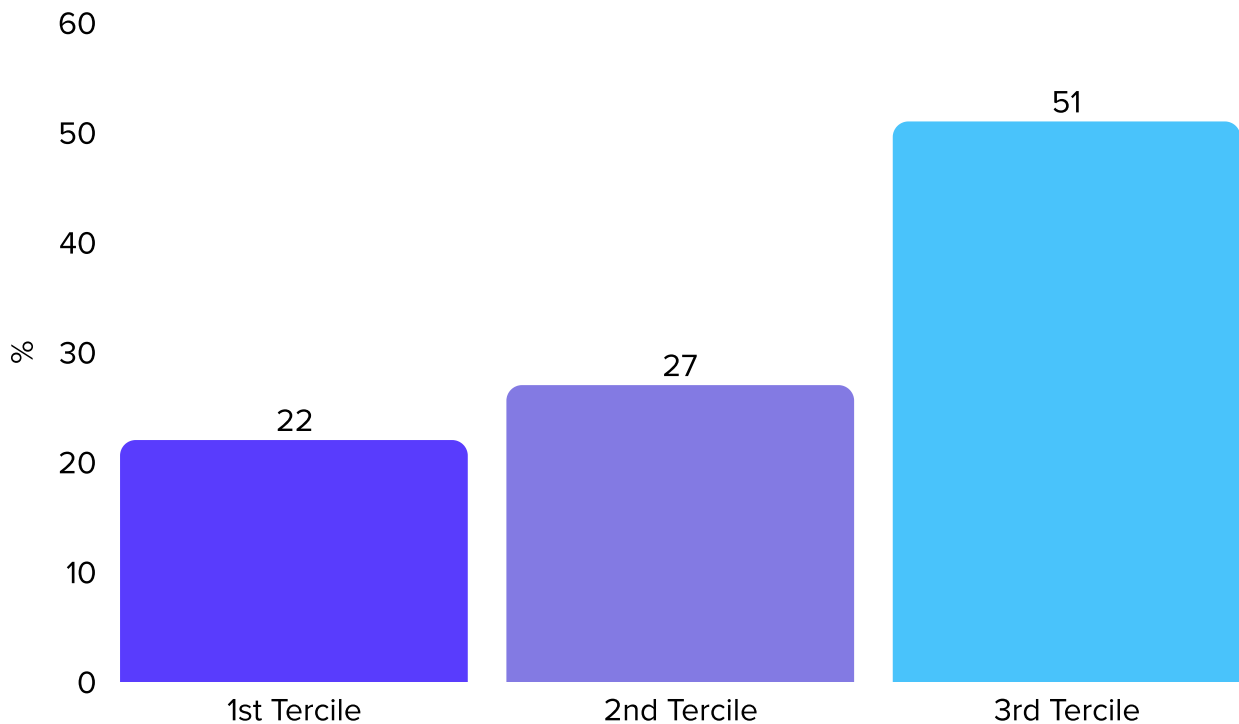
TIKTOK PURCHASE SESSIONS

Purchase sessions exhibit significantly elevated activity levels across all measured metrics. Overall there is a **1.25x increased activity** in purchase sessions versus non-purchase sessions. The strongest change in activity is TikTok search with a change of **over 2x**.



TIKTOK PURCHASE SESSIONS

Purchase Timing within Session



51% OF TIKTOK PURCHASE OCCUR NEAR THE END OF THE SESSION

The breakdown shows that 22% of purchases occur at beginning of a TikTok session, with another 27% taking place mid-session.

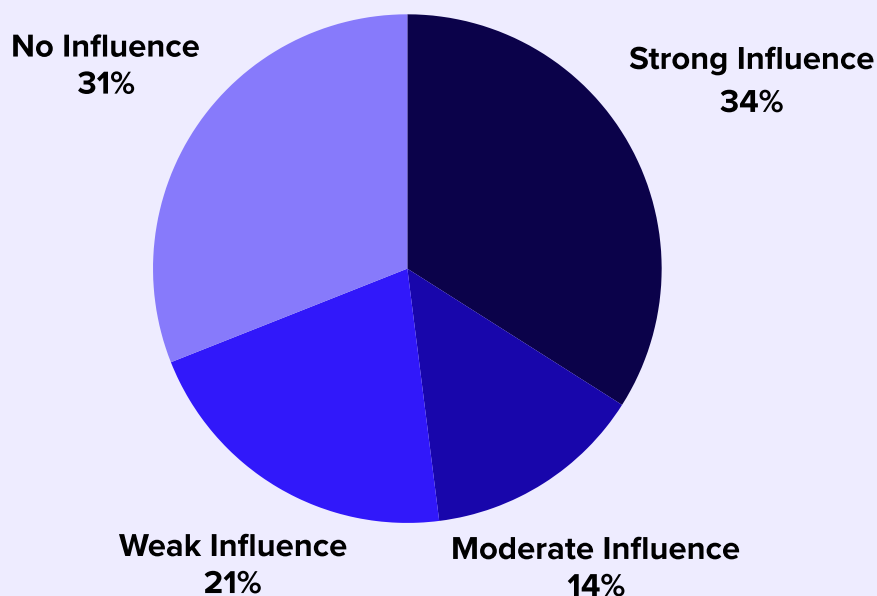
The **majority 51% happen in the final stretch**, indicating that most buying decisions may evolve over the session with discovery and engagement. This highlights the importance of keeping users engaged with content to capture late-stage intent.

CONTENT RELATEDNESS

IN TIKTOK PURCHASES

Overall Content Relatedness

A semantic analysis identified measurable content influence across purchase sessions. This analysis considered the video content and the search content within a measurable purchase session and whether the content/search was related to the purchase on a relatedness scale.



Search and Video Performance

While video content influences more sessions overall, TikTok search content demonstrates higher rates of strong influence (25% vs 14%), suggesting different functional roles in purchase journeys.

Video Content Influence:

- Present in 55% of purchase sessions
- Strong influence in 14% of sessions

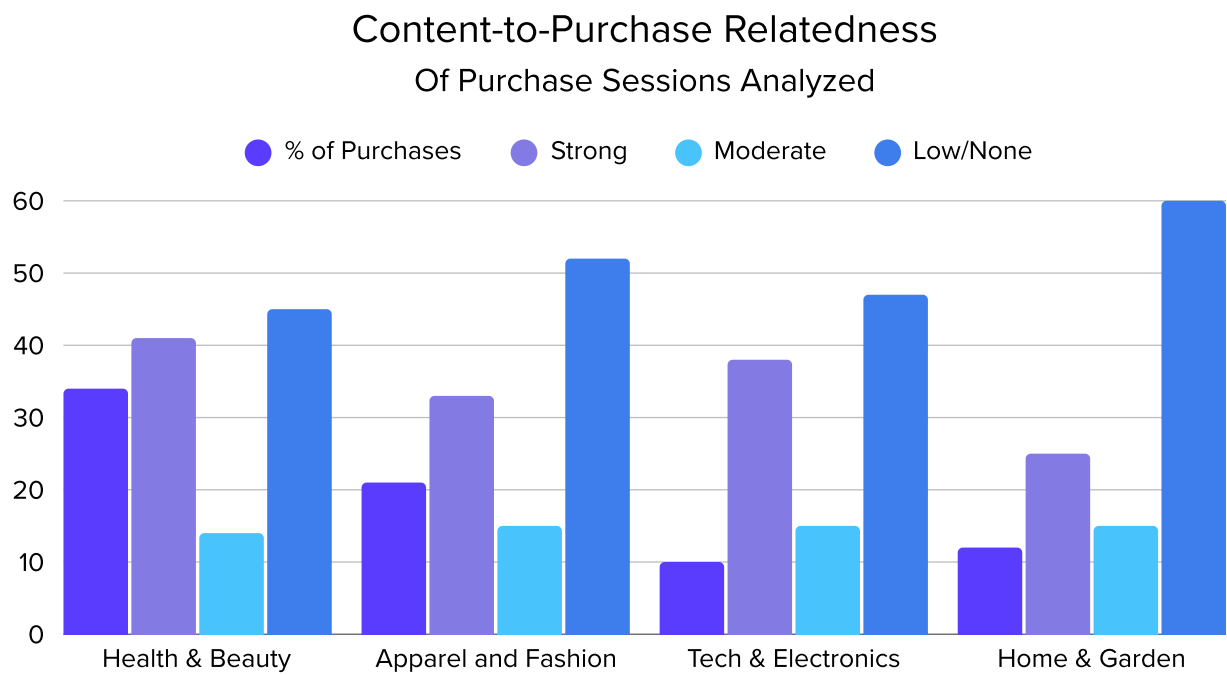
Search Content Influence:

- Present in 36% of purchase sessions
- Strong influence in 25% of sessions

“TikTok search has a strong influence on purchases in 25% of purchase sessions”

CATEGORY SPECIFIC RELATEDNESS

Different product categories exhibit distinct behavioral and relatedness profiles:



41% OF HEALTH & BEAUTY PURCHASE SESSION HAVE A STRONG CONTENT RELATEDNESS

Health & Beauty leads in both purchase volume (**34%**) and content influence rates, with **41%** showing strong content-to-purchase connections and only **25%** showing no detectable influence.

Technology & Electronics demonstrates high strong influence rates (**38%**) despite lower purchase volume, consistent with research-intensive purchase patterns where content plays a crucial role.

Home & Garden shows the lowest strong influence rate (**25%**) and highest no-influence rate (**37%**), suggesting more direct purchase behavior with less content-driven decision making.

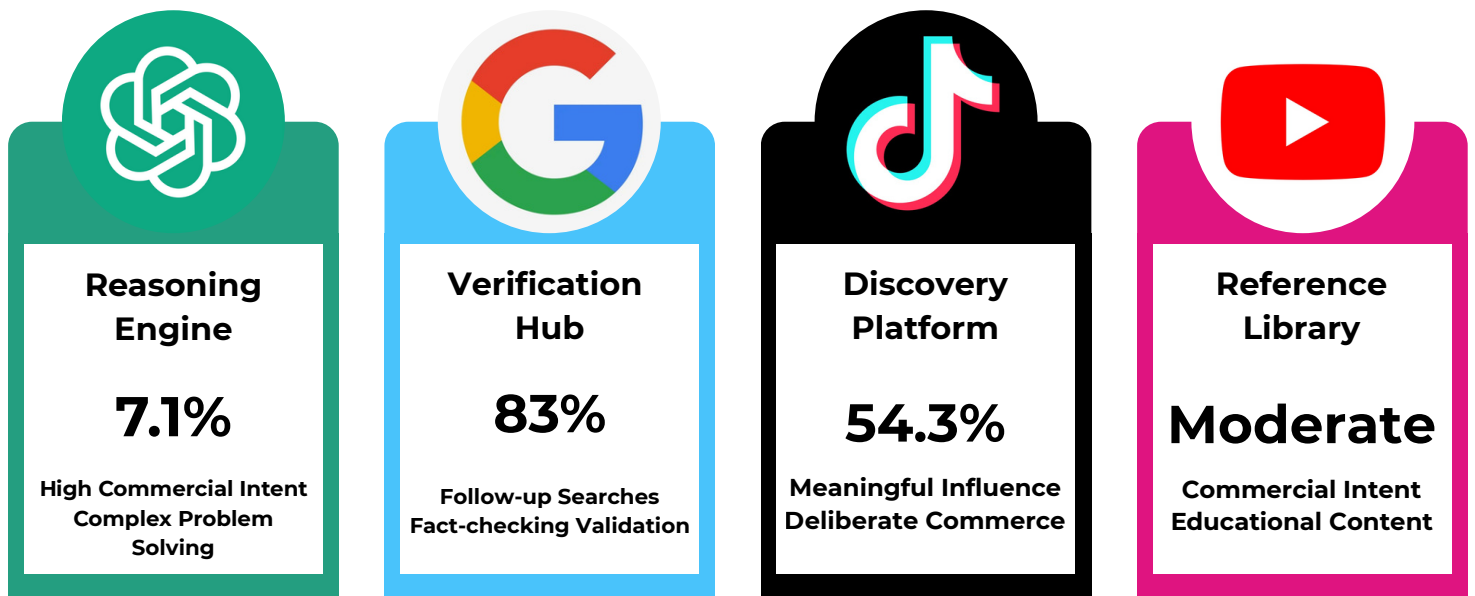
Fashion categories show balanced influence patterns with moderate strong influence rates (**33%**) and consistent moderate-level engagement.

MEASURE

Rather Than Choosing Between Platforms, Initial Findings Start To Support That Sophisticated Users Are Developing Specialized Workflows That Brands Must Understand And Serve.

For example, AI tools serve as reasoning engines for complex problem-solving, with **7.1%** of conversations showing high commercial intent focused on decision-making and analysis.

PLATFORM SPECIALIZATION STRATEGY



KEY TAKEAWAYS



AI and search are evolving together:

- **26%** of users in the study displayed behaviors that indicate they are expanding their toolkit and using AI to augment and not replace their search behavior.
- While there is some evidence of cannibalization or levels of replacement of one service for another, this is an evolving behavior that will need to be tracked over time as users settle into a new paradigm



Generative AI is seeing early stages of commercial relevance:

- While we saw just over **7% of conversations** having high commercial relevance, this is an early indicator that consumers are turning to these platforms to help them make decisions related to commerce and transactions.
- **14.4%** were scored as having medium commercial relevance. These are typically centered around brand research and category exploration.



TikTok has rapidly evolved from an entertainment platform to include a marketplace where discovery and commerce are tightly linked:

- Taken together, the data suggests TikTok is not just a space for viral trends, but a credible, content-led commerce channel
- TikTok is reshaping the way people discover, consider, and purchase products. Unlike traditional ecommerce, where users arrive with clear intent, TikTok shopping often begins with serendipitous content and unfolds within highly engaged sessions.

THE MEASURE PROTOCOL DIFFERENCE

Consumer behavior patterns are crystallizing rapidly. The companies that understand and optimize for actual consumer research journeys will capture disproportionate market share as these sophisticated behaviors become standard across all demographics.

While competitors rely on incomplete platform data and survey responses, Measure Protocol delivers the only comprehensive view of modern consumer behaviors. Our privacy-first, consent-based methodology provides granular insights into how consumers actually search, research, discover, and purchase across the complete digital ecosystem.

Exclusive Capabilities:

- AI-integrated behavior analysis across ChatGPT and emerging platforms
- Real-time cross-platform insights for complex customer journeys
- Premium segment identification with superior engagement prediction
- Predictive market intelligence before trends become apparent through traditional metrics

Measure Protocol is the premier provider of comprehensive consumer behavior analytics, delivering unprecedented insights into how individuals actually interact with the complete digital ecosystem. Founded in 2018 by industry veterans from media, adtech, and market research, we solve the fundamental challenges of understanding consumer behavior in an increasingly complex, multi-platform digital landscape.

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MEASURE

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