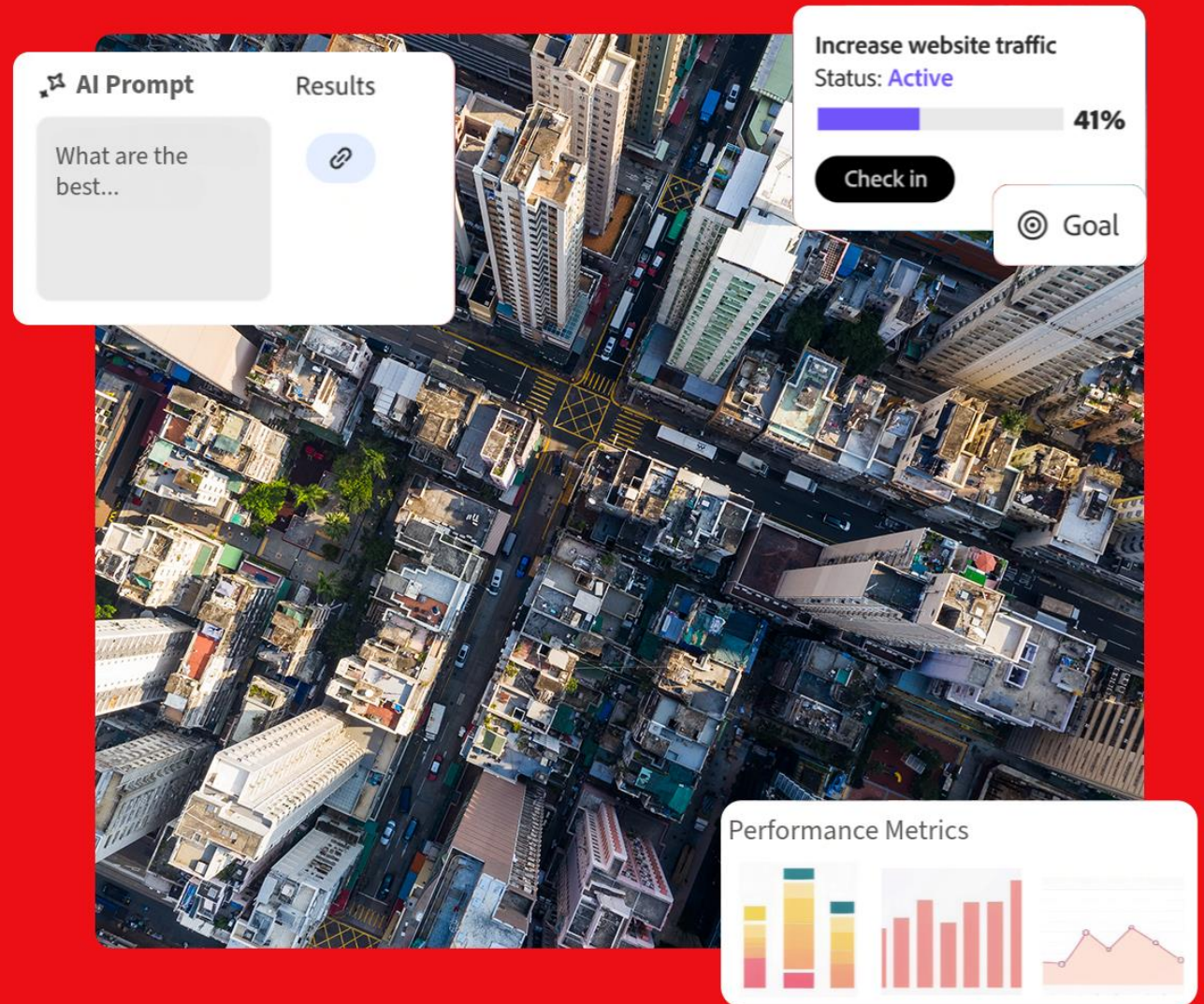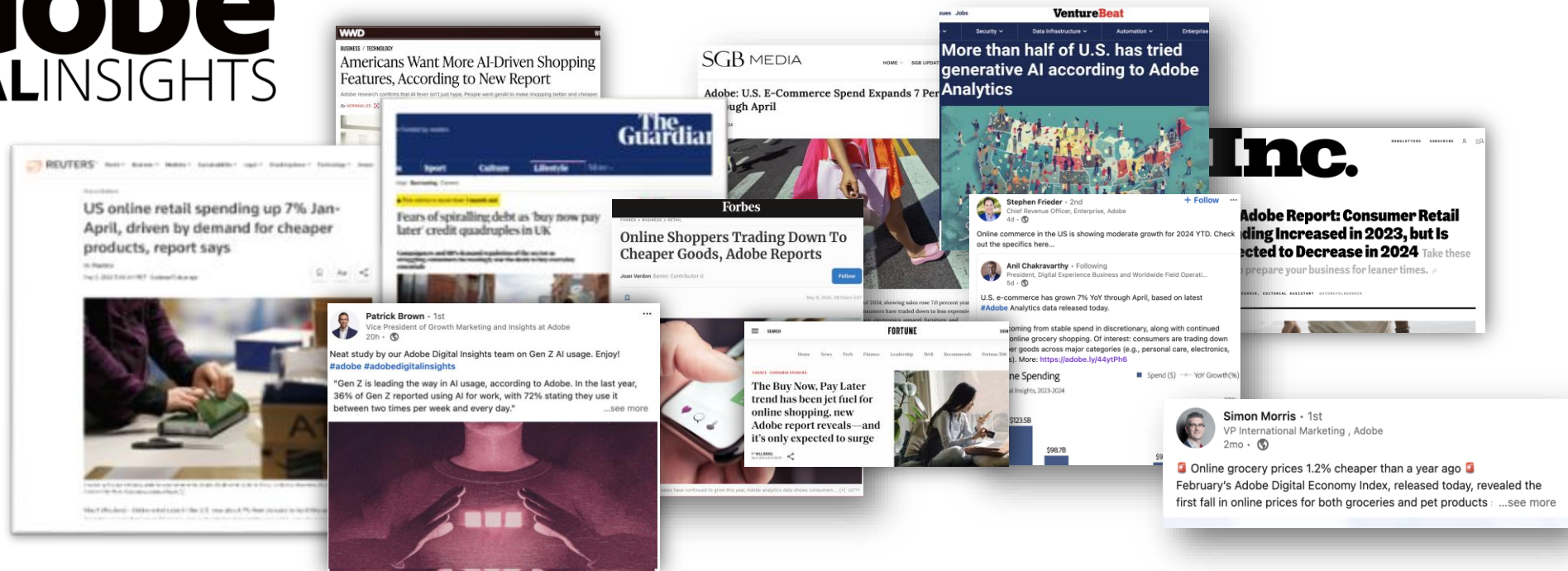# Quarterly AI Traffic Report

By Adobe Digital Insights,
January 2026

Adobe

📊 Methodology

The Adobe Digital Insights (ADI) offers the most comprehensive set of insights of its kind, based on analysis that covers over *one trillion* visits to U.S. retail sites and over *100 million* SKUs, more than any other technology company. Analysis is significantly more in-depth and precise compared to other data sources because only Adobe has access to this volume of real-time, granular, transactional consumer data. It is aggregated and anonymized to provide insights on consumer spending and emerging trends.

Adobe additionally conducted consumer surveys of 1,000+ respondents in November 2025 on the use and attitudes toward GenAI, focusing on how consumers leverage AI in their online shopping journey—from discovery and product research to purchase decisions during the holiday season. Reviewing the Holiday survey alongside insights from earlier surveys (September 2025) reveals a clear story of growing usage and improving perceptions of GenAI.

To learn more about Adobe Digital Insights (ADI) and the opportunity to receive bespoke reports, speak with your Adobe Account Team.

Key Insights

- AI-driven traffic is surging across key industries as retail, travel, financial services, and tech/software saw triple-digit growth, during this past holiday season.

- AI referrals to retail sites outperformed non-AI sources this holiday season across nearly all key metrics, from conversion to bounce rate to revenue per visit—which saw a seismic shift from just 12 months ago.

- AI adoption in retail is accelerating fastest in traditional tech and education hubs on the West Coast and Northeast, shaped by wealth, diversity and urban concentration.

- AI-driven visits to travel sites have taken off as more consumers leverage these tools to help research, plan, budget, and even pack for their next trip.

- Trust in AI financial recommendations is strengthening as more consumers engage Large Language Models (LLMs) to understand financial products, get banking or investment advice, and navigate complex financial activities.

- AI-driven visit share was highest in tech/software this holiday season, with engagement and bounce rate gaps between AI and non-AI sources the largest of any other industry—signaling increased AI adoption in more technical and complex sectors.

AI Referrals: Industry Snapshot

Adobe

From Travel to Tech: AI Referrals Surge Triple-Digits Across Sectors This Holiday
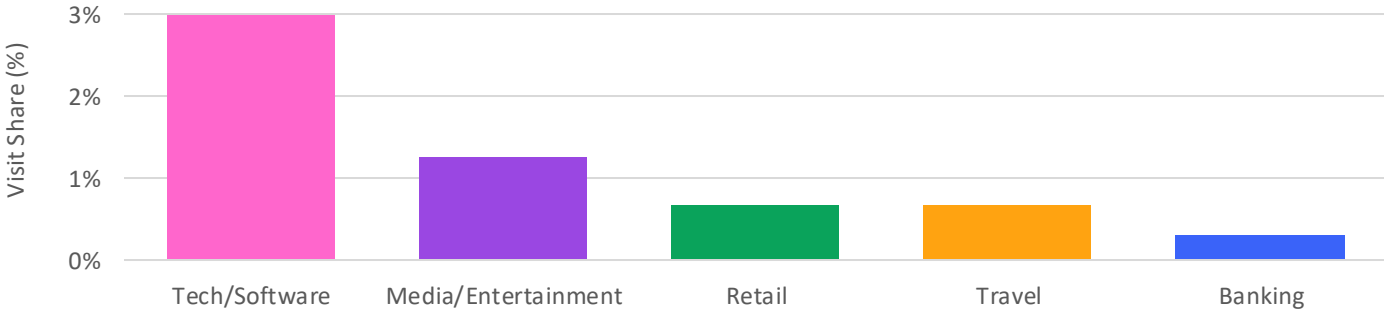
AI referrals surged across industries this holiday season (November 1 – December 31, 2025):

- Retail: **+693% YoY**
- Travel: **+539% YoY**
- Financial services: **+266% YoY**
- Banking: **+344% YoY**
- Media/Entertainment: **+92% YoY**
- Tech/Software: **+120% YoY**

Tech/software led all other industries in AI-driven visit share followed by media/entertainment, reflecting AI's use in more technical and complex industries.
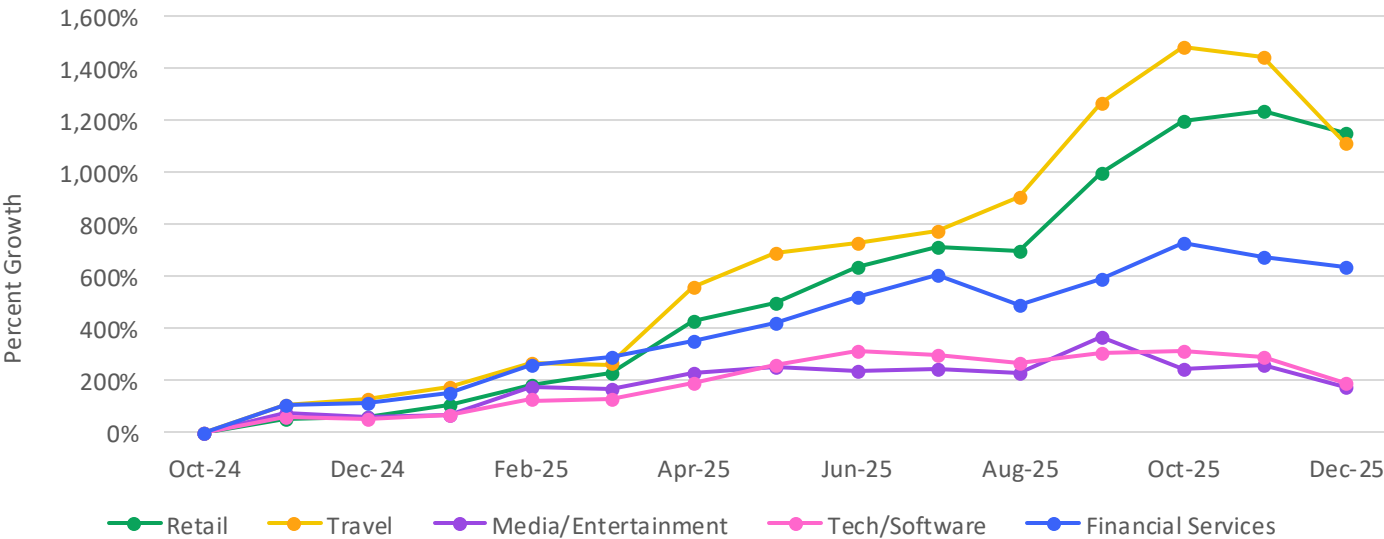
Visit Share by Industry
Adobe Digital Insights, October 2024 – December 2025

Growth in AI Visit Share by Industry
Adobe Digital Insights, October 2024 – December 2025
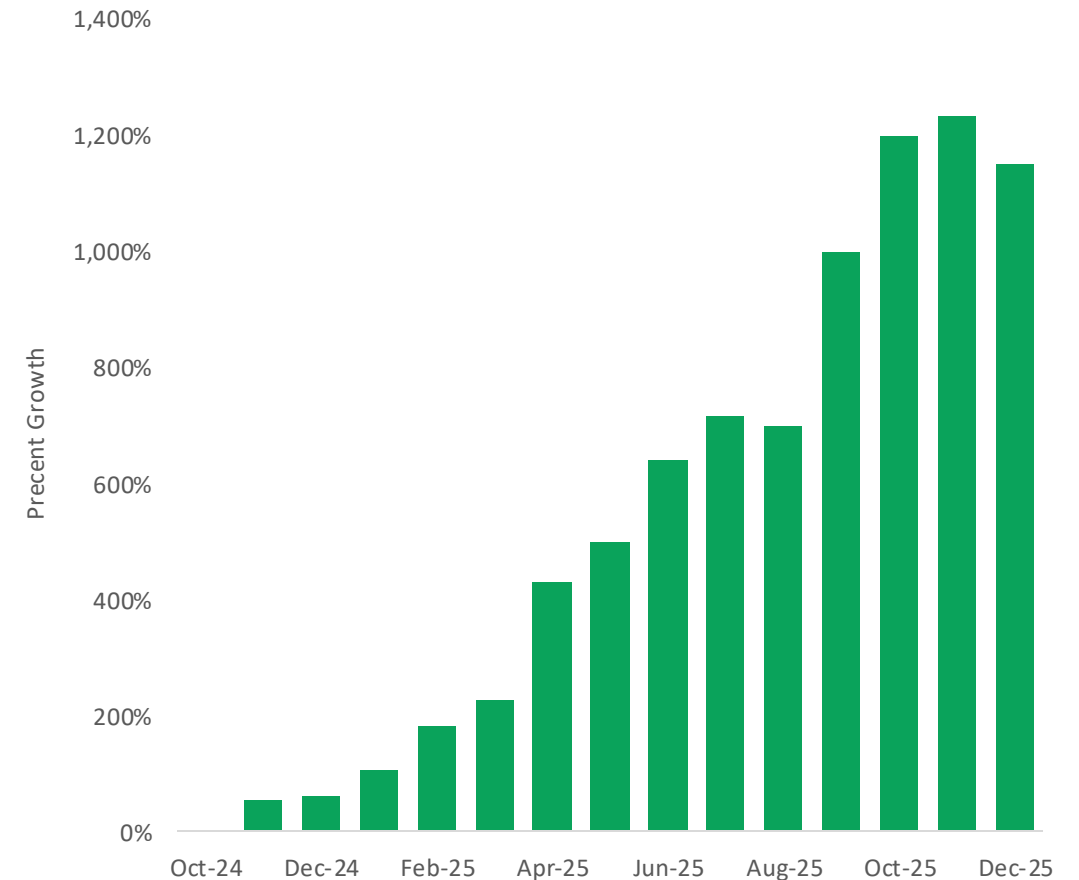
Retail

AI Referrals Rapidly Climb With Double-Digit Monthly Growth

- GenAI-driven retail traffic skyrocketed this holiday season, increasing **693% YoY (up 769% in November, 673% in December)**, highlighting explosive momentum.

- Growth continues to accelerate, reaching **527% since January 2025**, reflecting the rapid adoption and impact of AI Assistants this year.

- According to the Holiday 2025 Adobe Consumer Survey, more than **one-third** of shoppers used AI Assistants, with **about half** leveraging AI for holiday shopping.

- **81%** of consumers reported an improved shopping experience thanks to AI Assistants.

Growth in AI-Driven Visit Share (Retail)
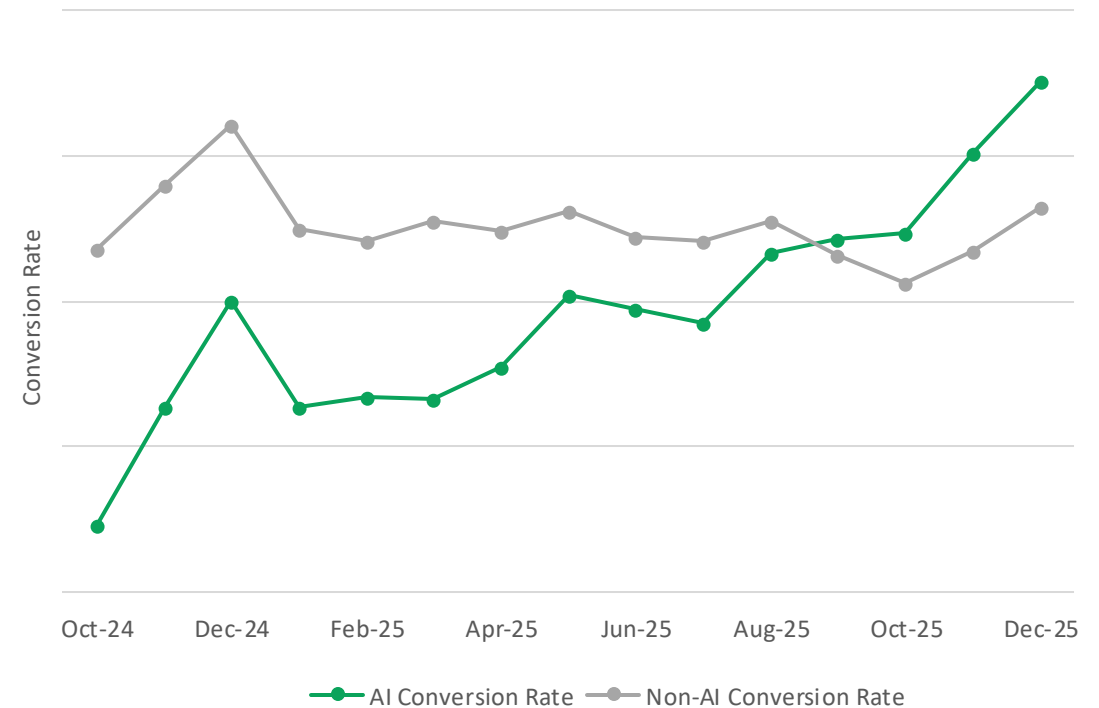Adobe Digital Insights, October 2024 – December 2025

AI Conversion 31% Higher This Holiday Season

- This holiday season, AI referrals to retail sites moved from lagging to leading, converting **31%** more than non-AI sources, nearly doubling year-over-year.

- Key shopping events widened the gap: AI conversions were **54% higher** than non-AI on Thanksgiving and **38% higher** on Black Friday.

- Growth is fueled by AI search adoption, rising consumer trust, and familiarity with AI Assistants—**47%** of consumers reported trust in AI.

- As trust grows, usage increases: **64%** consumers are using AI Assistants more than they used to.

💡 Key Insight: Purchase confidence is also rising. 65% of consumers using AI for online shopping report that they are more confident in their purchase after the help of AI, with 68% reporting they are less likely to return the product after using AI for the purchase.

Monthly AI vs. Non-AI Conversion Rate (Retail)

Adobe Digital Insights, October 2024 – December 2025

Conversion Rate

Oct-24 · Dec-24 · Feb-25 · Apr-25 · Jun-25 · Aug-25 · Oct-25 · Dec-25

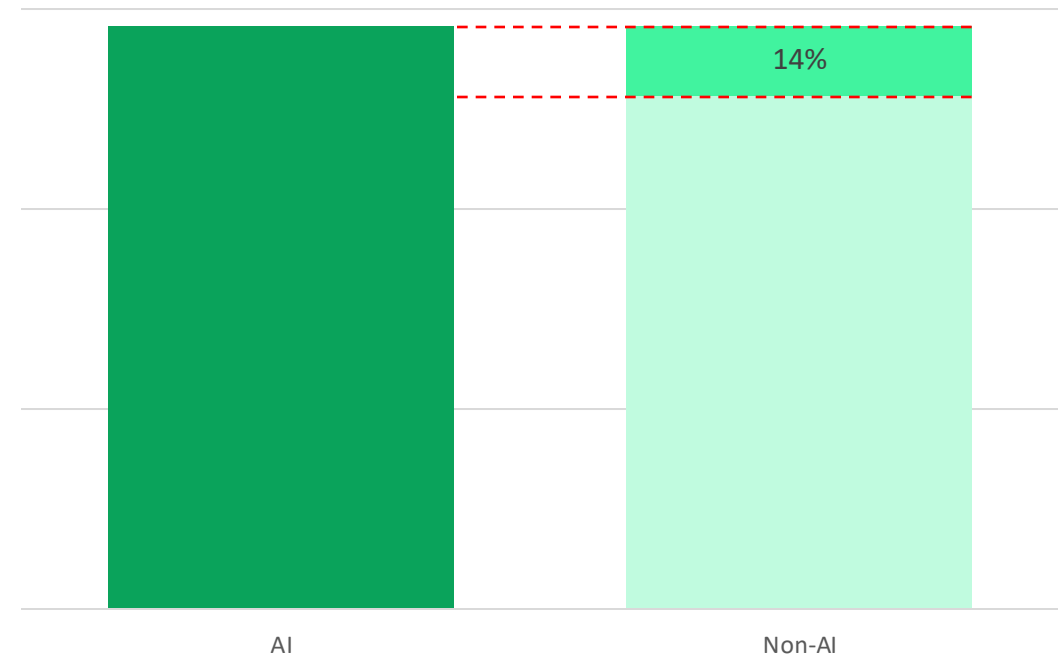●— AI Conversion Rate ●— Non-AI Conversion Rate

AI Assistants Provide Highly Relevant Content Aligned to Shopper Intent

- AI referrals are drawing more engaged, research-oriented users, with AI-driven traffic showing **14% higher engagement** (visits minus bounces) during this holiday season compared to non-AI sources.

- This elevated engagement is up from the consistent 9-12% lift observed since September 2024**,** signaling a **lasting shift in user behavior**.

💡 Key Insight: Higher engagement from AI-referred traffic suggests that users are spending more time exploring content, likely because AI-generated results are more relevant and closely aligned with their shopping intent. 81% of consumers using AI Assistants for their online shopping report that they have improved their shopping experience.

AI vs. Non-AI Engagement Rate (Retail)
Adobe Digital Insights, November – December 2025
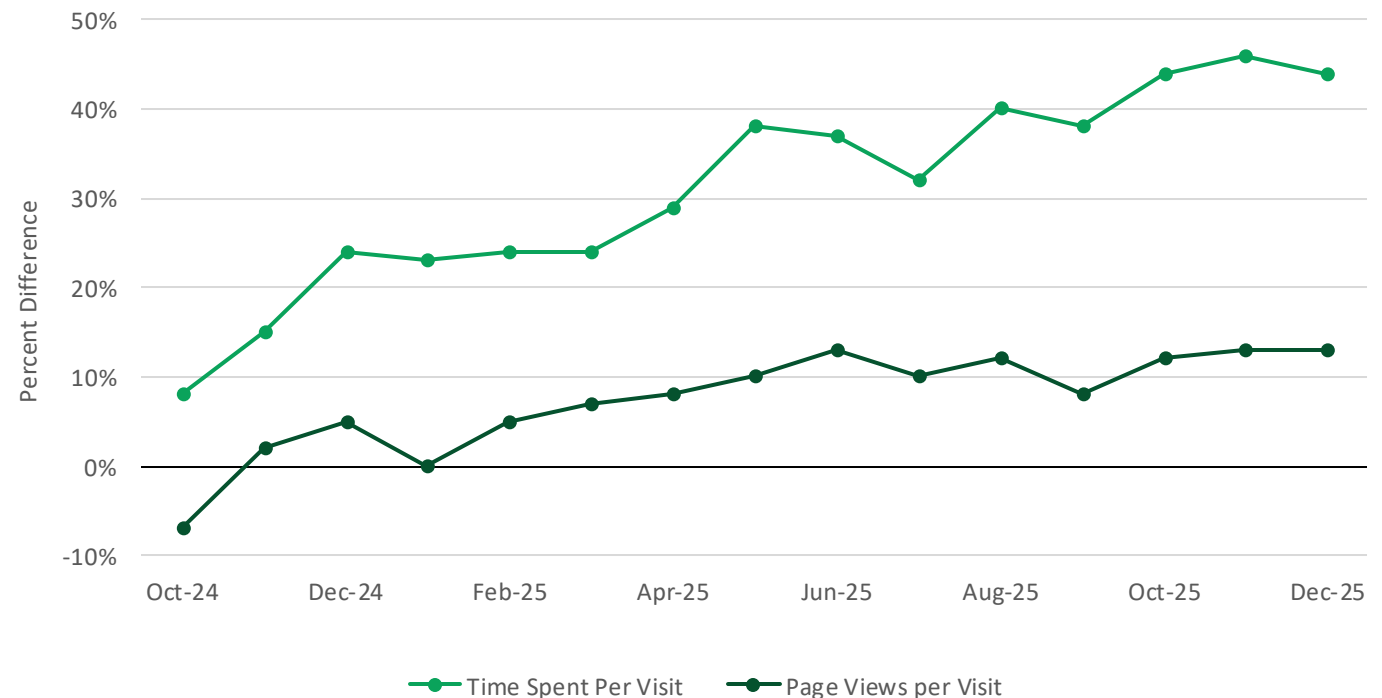
14%

AI

Non-AI

AI Drives Longer, Deeper Sessions, Outpacing Traditional Channels

- AI is not only attracting more engaged users but driving lasting behavioral change.

- **AI-referred users consistently spend more time on site**, with the largest gap during the holiday season where time per AI visit was **45% longer** than visits from other channels.

- **AI-driven sessions are now surpassing non-AI sessions in browsing depth**, reflecting deeper engagement. AI-referred users viewed **13% more pages per visit** than other sources this holiday season.

Monthly AI vs. Non-AI Time Spent per Visit/Page Views per Visit Percent Difference (Retail)

Adobe Digital Insights, October 2024 – December 2025

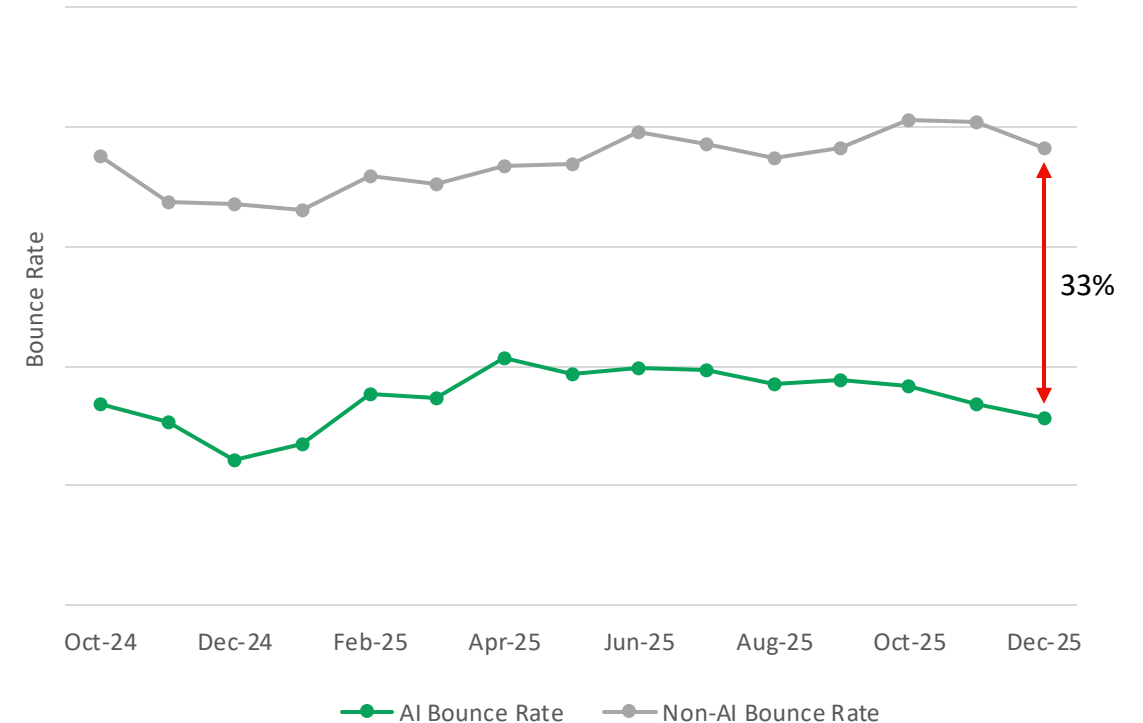Legend: Time Spent Per Visit, Page Views per Visit

Consumers Referred by AI Assistants are 33% Less Likely to Leave Immediately

- **AI referrals consistently outperform in bounce rate**, reflecting stronger content relevance and user intent.

- As AI recommendations improve, bounce rates remain significantly lower—**33% lower than non-AI traffic** this holiday season.

- **The bounce rate gap has stayed consistently wide**, underscoring AI's long-term advantage in driving more engaged, high-quality visits.

Key Insight: 64% of consumers using AI for online shopping report that they are satisfied with the links that AI Assistants provide and more than 55% report that they click on the links AI provides to them.

Monthly AI vs. Non-AI Bounce Rate (Retail)

Adobe Digital Insights, January 2025 – December 2025

Bounce Rate

33%

Oct-24 Dec-24 Feb-25 Apr-25 Jun-25 Aug-25 Oct-25 Dec-25
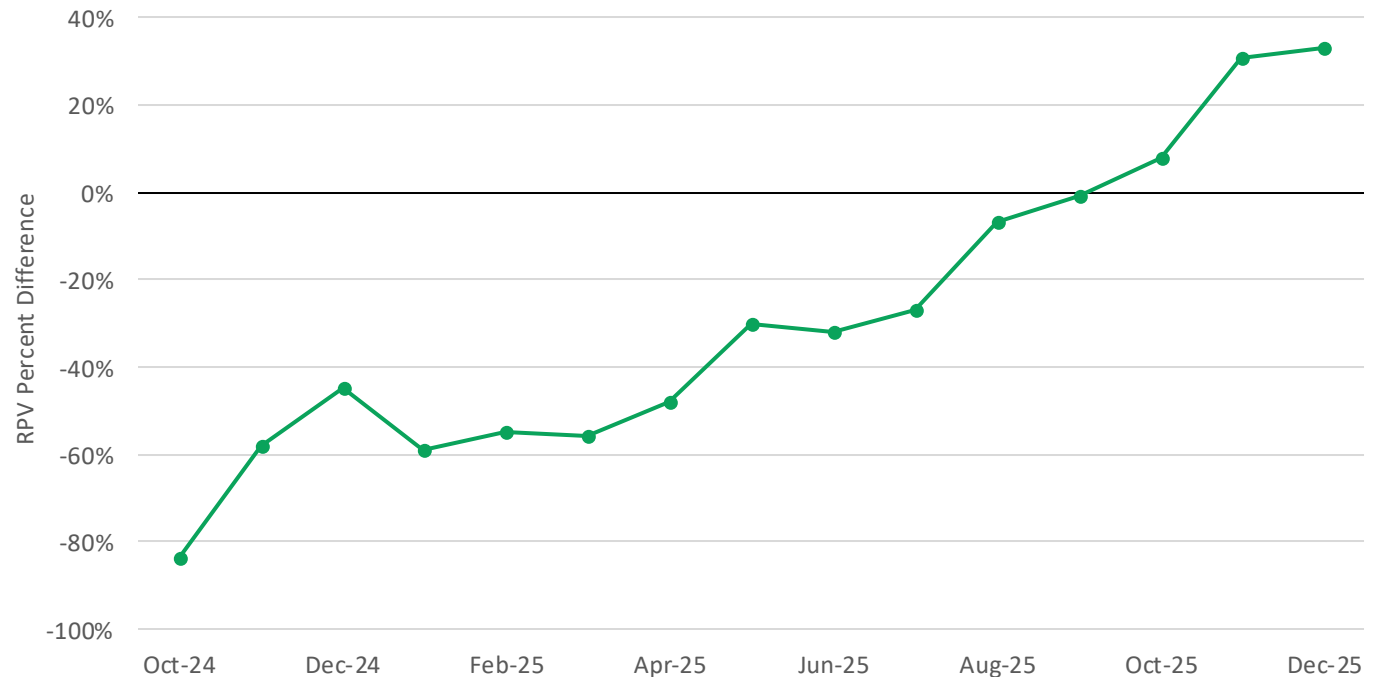
AI Bounce Rate   Non-AI Bounce Rate

Massive Revenue Swing Sees AI Visits Worth 32% More Than Non-AI Visits

- **AI-driven Revenue Per Visit (RPV) surged this holiday season**, up **254% year-to-date**, delivering **32% higher RPV** than non-AI traffic.

- This is seismic shift from just 12 months ago when non-AI-driven visits were worth **51% more in the 2024 holiday season**—demonstrating sustained growth and efficiency gains.

Monthly AI vs. Non-AI Revenue per Visit Percent Difference (Retail)

Adobe Digital Insights, October 2024 – December 2025

Retail AI Demographics

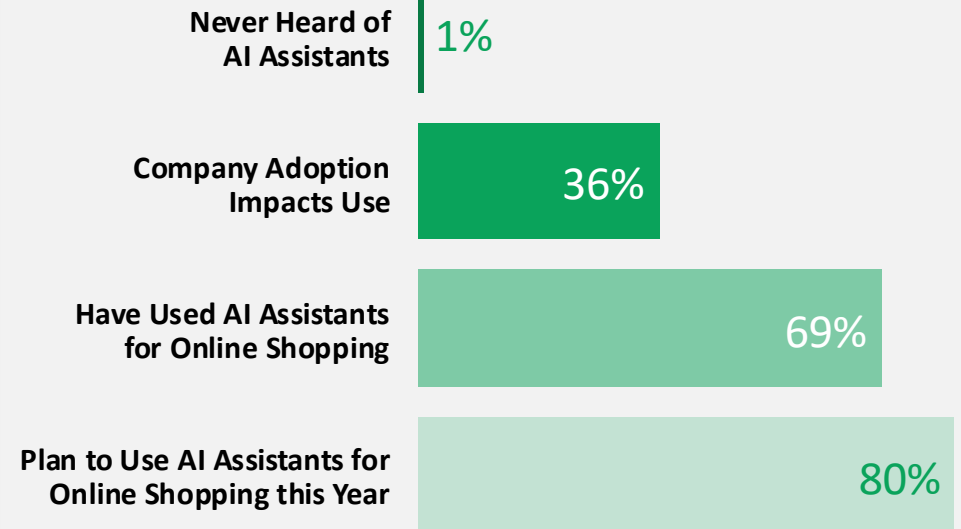# Traditional Innovation Hubs Lead in AI Adoption

- GenAI adoption is accelerating fastest in innovation corridors where technology, education, and digital industries converge.

- Virginia, Washington, New York, Massachusetts, and California show GenAI engagement **up to 2 times the U.S. average**.

- Northeast and West Coast states demonstrate strong per-capita AI engagement, fueled by dense digital economies and mature tech ecosystems.

- According to the August 2025 Adobe Consumer Survey, **only 1% of consumers** in the technology industry have never heard of AI Assistants, with **36% reporting company adoption** as a primary driver of their AI use.

AI Traffic Leaders

Virginia

Washington

New York

Massachusetts

California

Technology

Never Heard of AI Assistants	1%
Company Adoption Impacts Use	36%
Have Used AI Assistants for Online Shopping	69%
Plan to Use AI Assistants for Online Shopping this Year	80%

The Divide: Digitally Active, AI-Limited

- AI engagement lags in parts of the South and Appalachia: Mississippi, West Virginia, Louisiana, Kentucky, and Arkansas trail with less than half of the national average.

- While traditional innovation hubs lead, many regions remain digitally active but AI-limited—Mississippi is a clear example of the divide: high online activity but low AI exposure.

- High internet activity **does not equal** high AI usage; the gap stems from exposure and awareness, rather than access.

AI Laggards

Mississippi

West Virginia
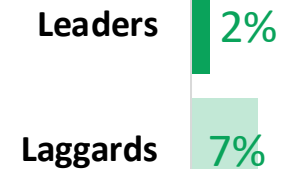
Louisiana

Kentucky

Arkansas

AI Assistant Awareness and Usage: Leading Versus Lagging States

- According to the August 2025 Adobe Consumer Survey, consumers in innovation-driven states are both more aware of and more likely to use AI Assistants compared to those in states where AI engagement is lower.

- In leading states, awareness of AI Assistants is nearly universal—on average, **only 2% of consumers** have never heard of them. In lagging states, **an average of 7% of consumers** are unfamiliar with AI Assistants.

- In leading states:
  - **46%** have on average used AI Assistants for online shopping.
  - **58%** on average plan to use them this year.

- In lagging states:
  - **39%** have on average used AI Assistants for online shopping.
  - **49%** on average plan to use them this year.

Never heard of AI Assistants

Leaders	2%
Laggards	7%

Have Used AI Assistants for Online Shopping

Leaders	46%
Laggards	39%

Plan to Use AI for Online Shopping This Year

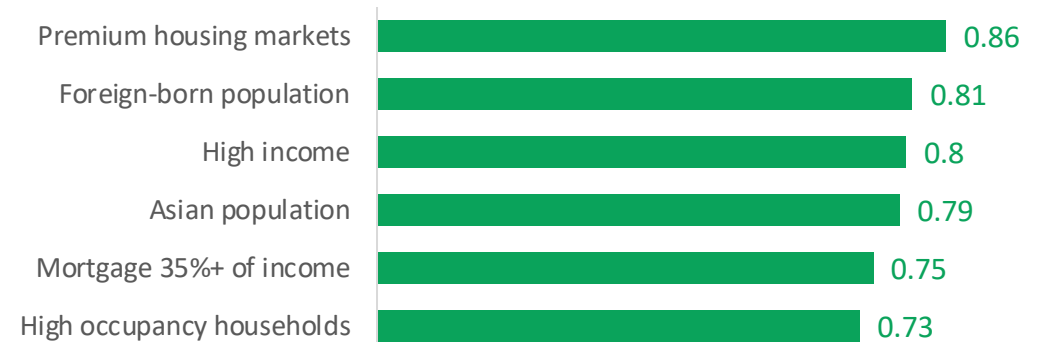|	
Leaders	58%
Laggards	49%

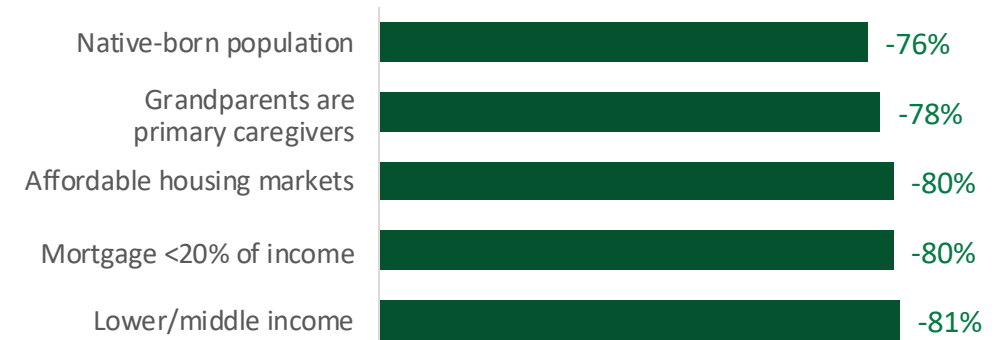# Socioeconomics and AI Adoption: Wealth, Housing, and Culture

- AI adoption isn't just about access to technology; it's about living in an ecosystem shaped by wealth, diversity, and urban concentration.

- Affluent, high-cost regions drive the highest engagement, with premium housing, elevated incomes, and substantial mortgage commitments closely tied to AI usage.

- Globally connected, diverse communities lead adoption, reflecting higher exposure to emerging technologies.

- Meanwhile, lower-income and affordable-housing communities show reduced AI engagement, with less AI exposure and more financial constraints.

- Native-born and multigenerational households show lower AI activity, indicating a possible generational or lifestyle divide in how emerging technologies are used.

Socioeconomic Correlations with AI Usage
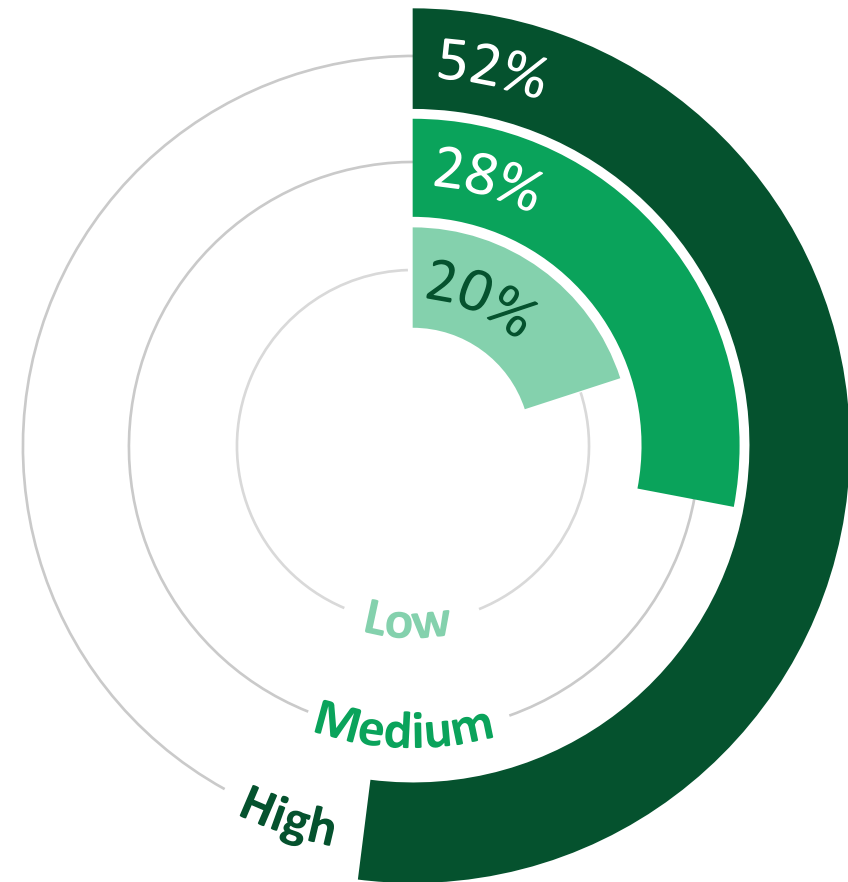
Strong Positive Correlations

Premium housing markets	0.86
Foreign-born population	0.81
High income	0.8
Asian population	0.79
Mortgage 35%+ of income	0.75
High occupancy households	0.73

Strong Negative Correlations

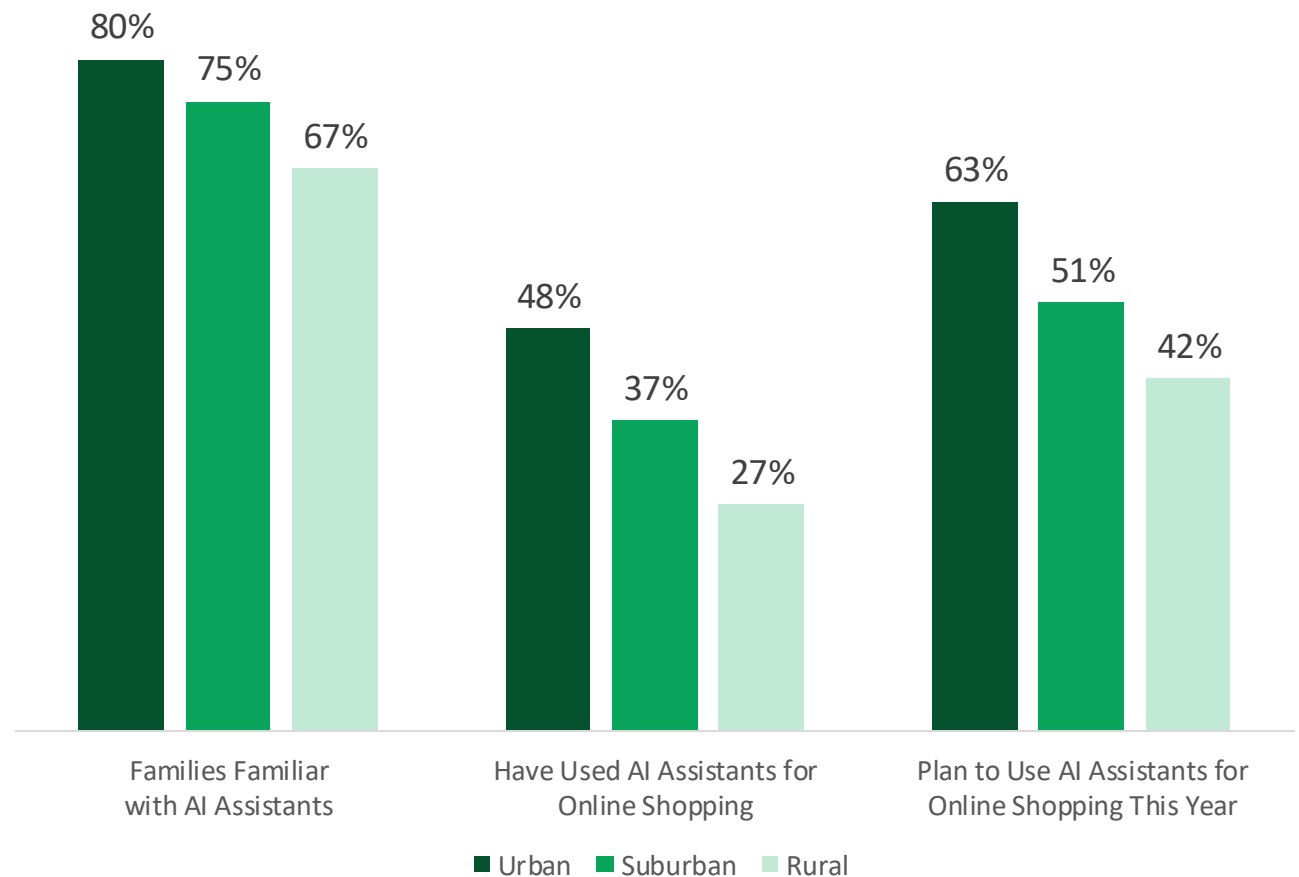|	
Native-born population	-76%
Grandparents are primary caregivers	-78%
Affordable housing markets	-80%
Mortgage <20% of income	-80%
Lower/middle income	-81%

High-Income States Lead in Both AI Adoption and Engagement

- High-income states not only generate more AI traffic but are also adopting it more intensively than mid- and low-income regions.

- As of September 2025, high-income states account for **52% of all U.S. AI traffic**, compared with **28% in mid-income and 20% in low-income states**.

- The adoption gap is widening, as high-income states continue to grow their AI engagement while mid- and low-income states lag behind.

- Since January 2025, high-income states have seen a **5-percentage point (pp) increase** in average AI share, while mid- and low-income states have remained flat or slightly declined.

52%
28%
20%
Low
Medium
High

Adobe

Urban Life Fuels Faster AI Adoption

- Consumers in urban communities are both more aware of and more likely to use AI Assistants than those in both rural and suburban areas, according to the August 2025 Adobe Consumer Survey.

- AI familiarity is higher in urban regions— **80% of consumers** report being aware of AI Assistants, compared with **two-thirds in rural areas**.

- Usage follows the same pattern: **48% of urban consumers** have used AI Assistants for online shopping **(63% plan to this year)**, versus **27% of rural consumers (42% plan to this year)**.

Chart data:

	Families Familiar with AI Assistants	Have Used AI Assistants for Online Shopping	Plan to Use AI Assistants for Online Shopping This Year
Urban	80%	48%	63%
Suburban	75%	37%	51%
Rural	67%	27%	42%

Legend: ■ Urban ■ Suburban ■ Rural

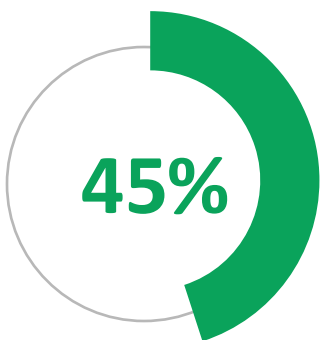# Diverse Consumers Lead in Turning AI Familiarity Into Action

- According to the August 2025 Adobe Consumer Survey, AI familiarity is high across all groups, but **highest among Asian or Pacific Islanders (81%)**.

- Despite similar awareness levels, usage gaps emerge in online shopping behavior: **57% of Asian or Pacific Islander** consumers have used AI Assistants compared with **just 35% of White consumers**.

Chart: Families Familiar with AI Assistants — Asian or Pacific Islander 81%, Black or African 76%, White 74%. Have Used AI Assistants for Online Shopping — Asian or Pacific Islander 57%, Black or African 47%, White 35%.

Legend: ■ Asian or Pacific Islander ■ Black or African ■ White

Retail Product Trends

AI-Boosted Product Categories This Holiday Season

45%

of consumers say they turn to AI for inspiration and ideas—**most often before they begin shopping.**
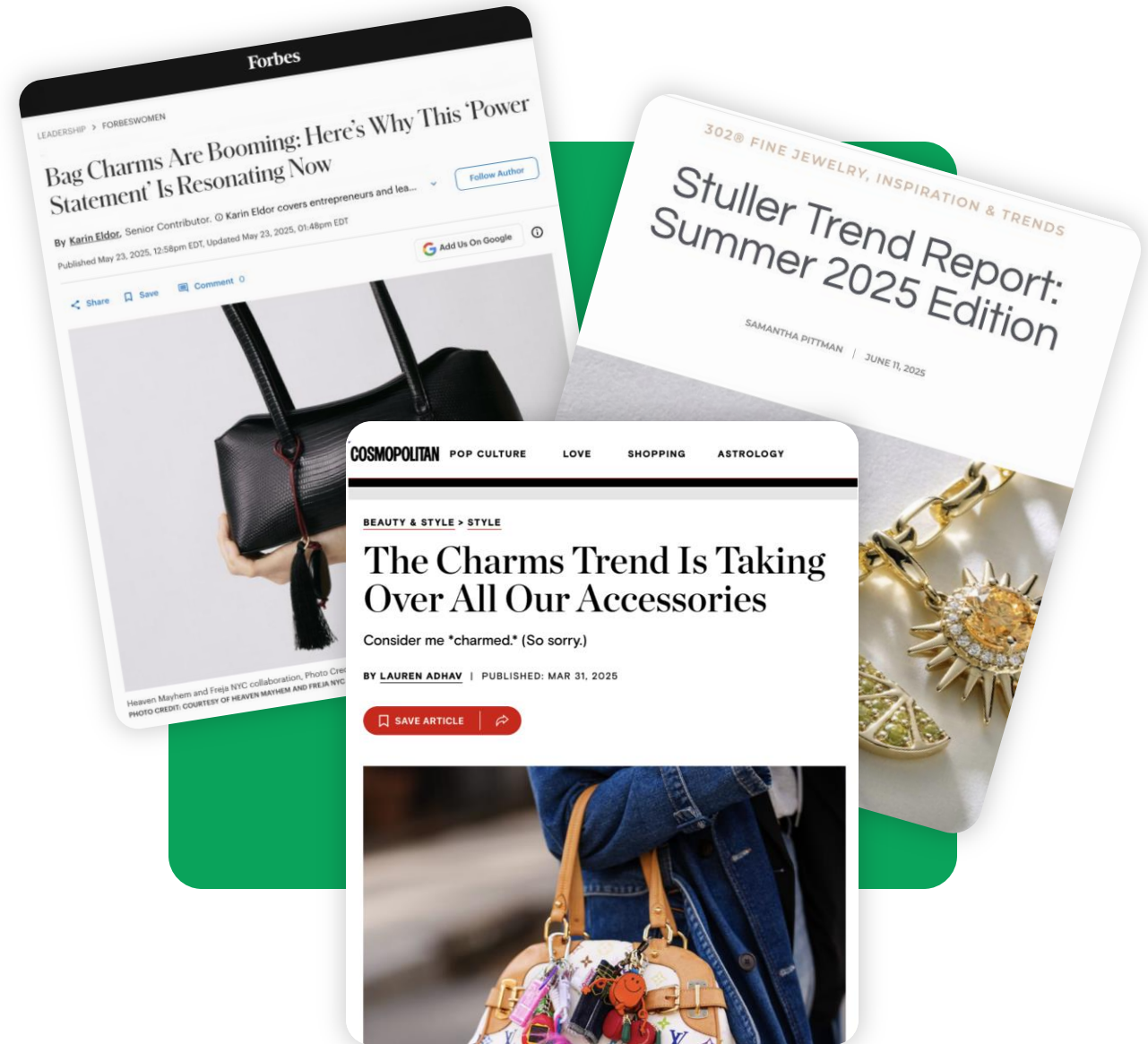
🚀 STRONG BOOST

- Appliances
- Video Games
- Toys
- Electronics
- Sporting Goods
- Home Improvement
- Auto Parts

⚡ MODERATE BOOST

- Apparel
- Personal Care Products
- Jewelry
- Home & Garden
- Books
- Medical Equipment

✴ WEAKER BOOST

- Grocery
- Furniture & Bedding
- Pet Products
- Non-Prescription Drugs
- Baby and Toddler products

Products that experienced strong AI-driven referral growth this season included:

- Nintendo Switch 2 Console
- Daise Bedazzled Kit
- Smartwatches
- Toys Swirly
- Gumball Machine

- Dyson Vacuum Cleaner
- CeraVe Serum/Serum/Moisturizer Products
- Lego Sets
- Air Fryers
- Hot Wheels Toys

Adobe

AI Shoppers Leverage LLMs for Current Trends

- In June 2025, charm accessories experienced a 450% boost over the May average, aligning closely with media coverage about this latest trend.

- The AI boost occurred days before the traditional traffic boost, highlighting AI's role in purchase ideation and AI-led top-funnel activation.

- According to the August Adobe consumer survey, 41% of shoppers using AI assistants for online shopping begin leveraging these LLMs prior to their shopping journey—primarily for inspiration—highlighting AI's growing role in *surfacing trends ahead of intent*.

LLMs are Becoming Seasonal Shopping Copilots

- Rather than searching for specific items, shoppers are using AI Assistants for ideas tied to holidays and life events where they need inspiration more than routine purchases.

- Gifting categories thrive in AI recommendations, with Assistants surfacing thoughtful options that once came from blogs or word-of-mouth.

- Valentine's Day saw lifts in flowers, jewelry, and personal care, while Mother's Day drove large surges in gift baskets and home décor.

- Similarly, seasonal items are bundled, with adjacent products gaining uplift alongside core items—for example, in May 2025, outdoor grills rose together with patio furniture and frozen desserts.
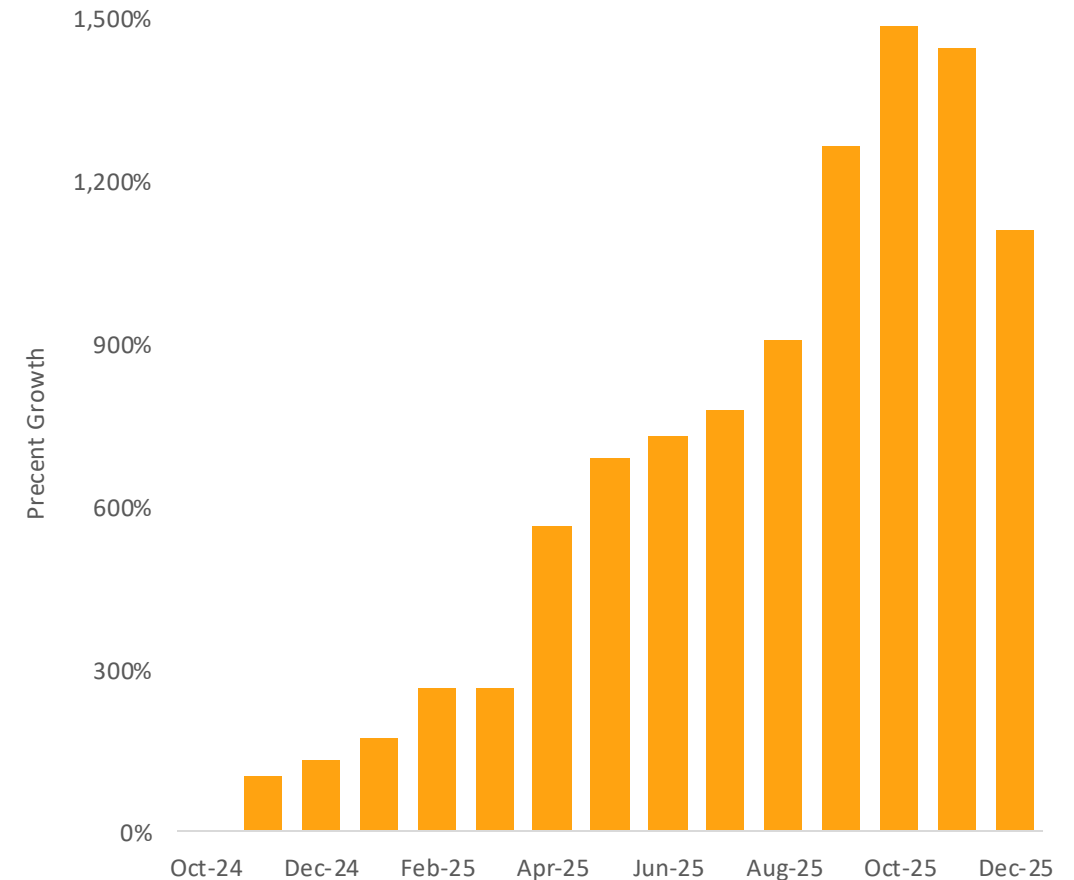
Travel

AI-Fueled Growth in the Travel Industry Shows No Signs of Slowing

- Consumers are increasingly turning to AI for travel planning and inspiration as research and recommendations from these tools become more widely adopted.

- This holiday season, **AI-driven visits to travel sites grew nearly 539% YoY**, with **+405% growth** since January 2025.

- In the August 2025 Adobe Consumer Survey, 88% of travelers using an AI Assistant reported an improved experience when planning through LLMs.

- Respondents from the Holiday 2025 Adobe Consumer Survey reported leveraging AI for **a wide range of travel tasks**, including:

  - Research: 44%

  - Inspiration and Recommendations: 41%

  - Budgeting: 26%

  - Packing Assistance: 22%

Growth in AI-Driven Visit Share (Travel)
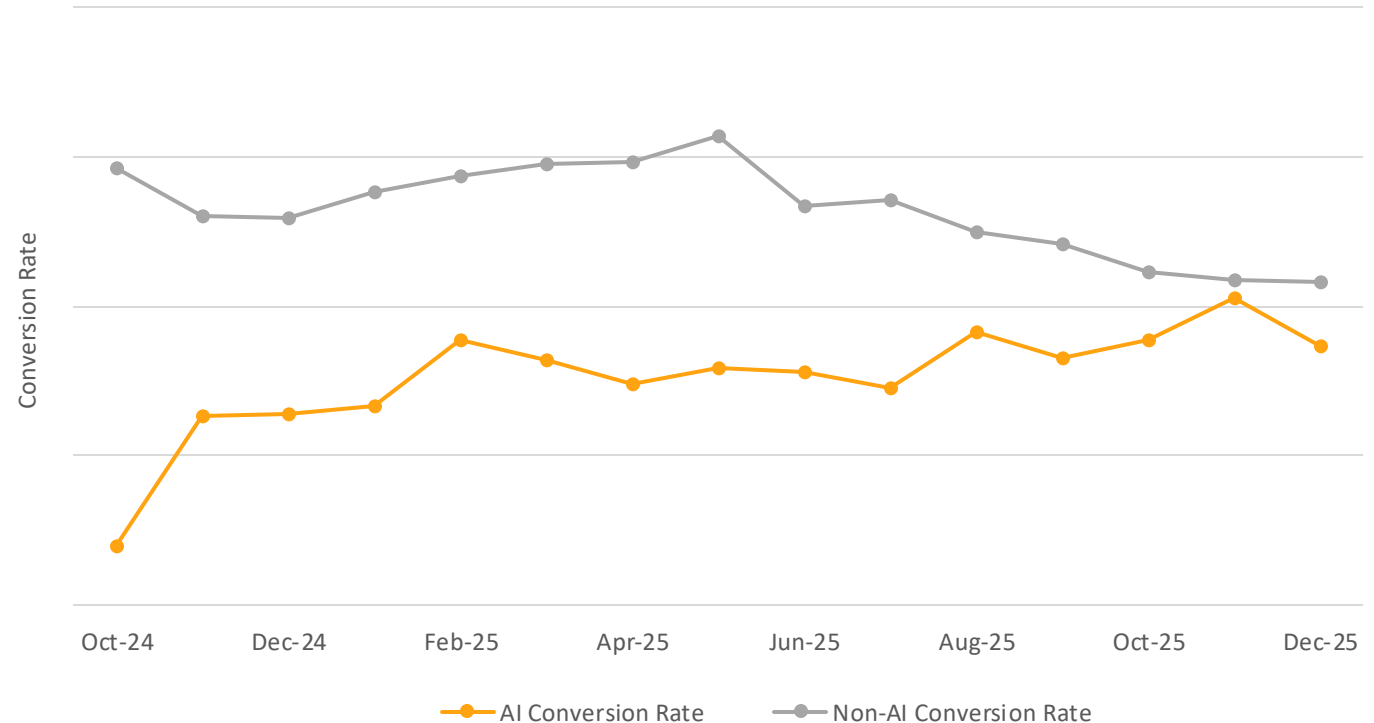Adobe Digital Insights, October 2024 – December 2025

AI Conversions Improve by 85% in Travel

- The conversion gap in the travel industry between AI and traditional sources **narrowed dramatically—from 86% in October 2024 to 13%** this holiday season, an **85% improvement** in less than a year.

- Although AI conversions still trail non-AI sources, the gap continues to close, signaling the rise in traveler confidence in AI-powered recommendations.

Monthly AI vs. Non-AI Conversion Rate (Travel)

Adobe Digital Insights, October 2024 – December 2025

Conversion Rate

Oct-24 Dec-24 Feb-25 Apr-25 Jun-25 Aug-25 Oct-25 Dec-25

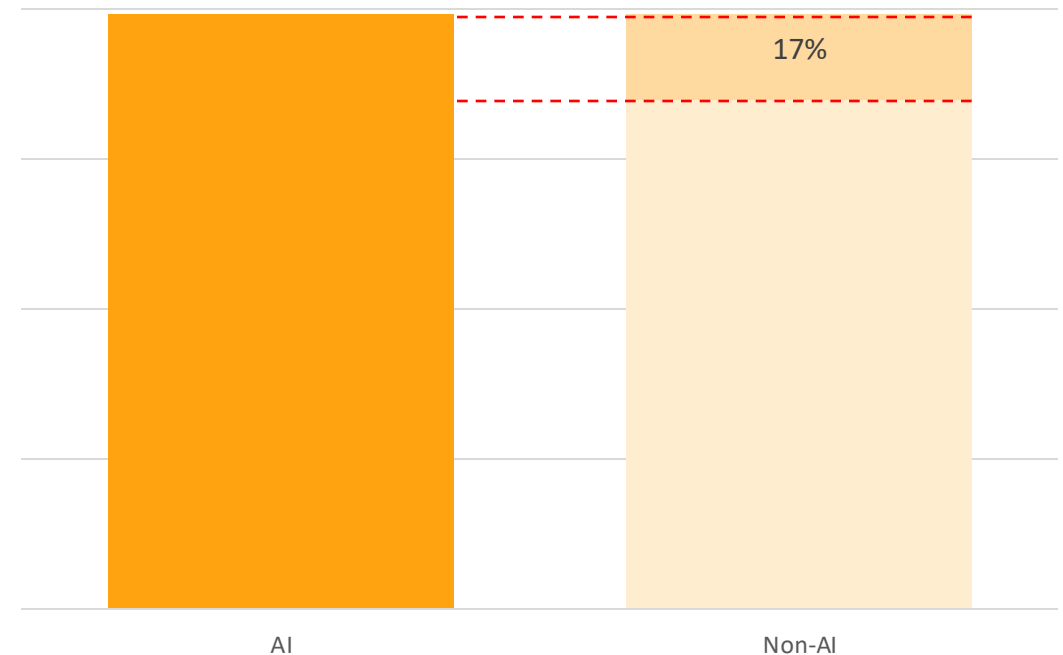— AI Conversion Rate — Non-AI Conversion Rate

AI Adoption Drives Higher—and Higher-Quality—Engagement to Travel Sites

- During the 2025 holiday season, AI-driven traffic to travel sites outperformed traditional sources **by 16.8% in engagement rate** (visits minus bounces), demonstrating that AI referrals spend more time and interact more meaningfully with these sites after arriving.

- AI referrals are delivering higher-quality engagement, driven by lower bounce rates (33% lower), more pages per visit (21% higher), and **longer time on site (65% longer)**—underscoring AI's strength this holiday season.

AI vs. Non-AI Engagement Rate (Travel)

Adobe Digital Insights, November – December 2025
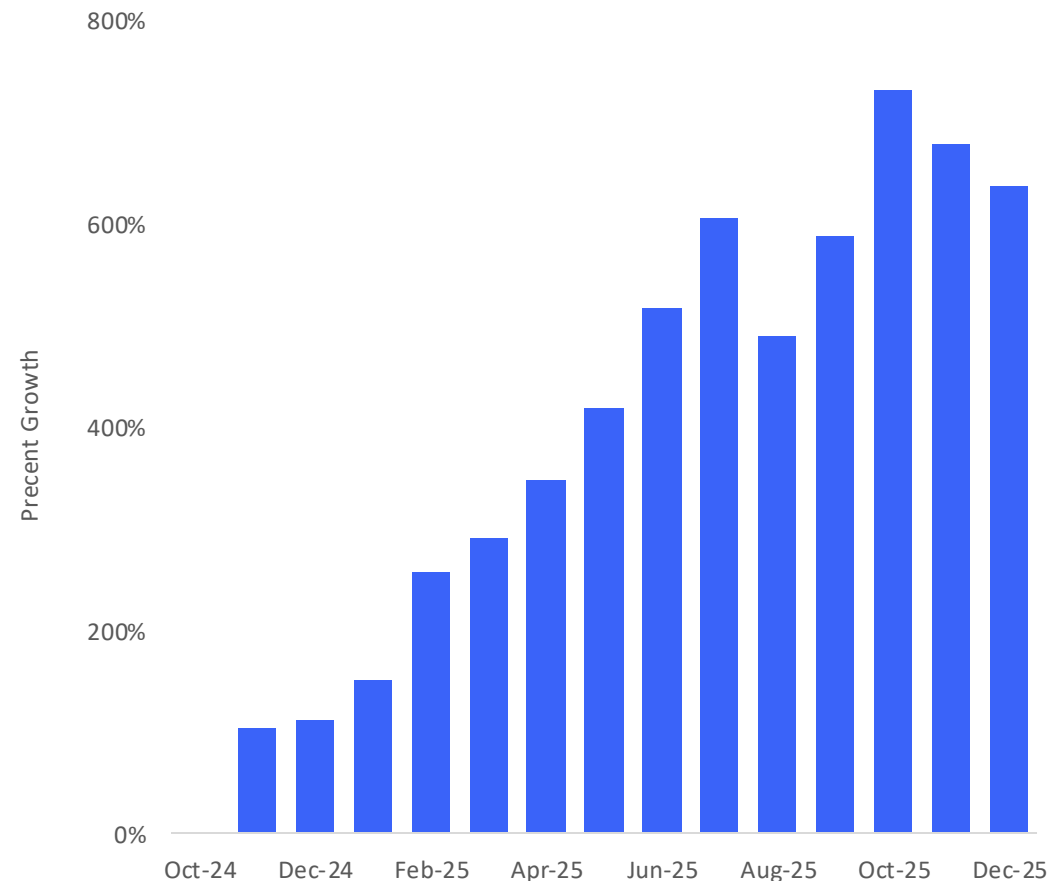

17%

| AI | Non-AI |

Financial Services

AI-Driven Growth Surges on Financial Sites This Holiday

- During the 2025 holiday season, **AI-driven visits to financial services sites grew 266% YoY**, with **+203% growth** since January 2025.

- According to the Holiday 2025 Adobe Consumer Survey, **21% of consumers are using AI Assistants** for financial needs.

- The August 2025 Adobe Consumer Survey results indicate that **28%** of respondents reported an **improved shopping** experience as a result of GenAI.

Growth in AI-Driven Visit Share (Financial Services)
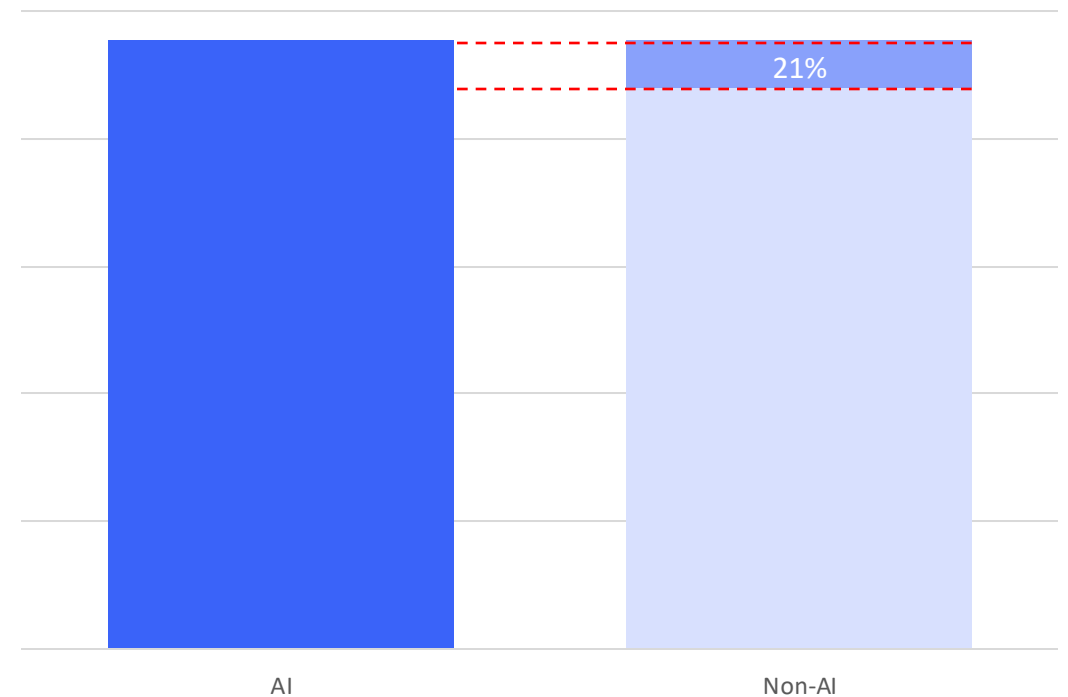Adobe Digital Insights, October 2024 – December 2025

Not Just More Traffic, AI Drives Significantly Longer Sessions Too

- This holiday season, AI users on financial services sites **spent 21%** more time per visit than non-AI users, reflecting deeper exploration and engagement.

- The Holiday 2025 Adobe Consumer Survey results show consumers are leveraging AI across a wide range of financial activities, including:

  - Understand Financial Products: **36%**

  - Investment Recommendations: **35%**

  - Banking Recommendations for Checking and Savings Accounts: **36%**

  - Personalized Budgeting: **25%**

  - Understanding Complex Topics (Strategies, Concepts): **30%**

AI vs. Non-AI Time Spent per Visit (Financial Services)

Adobe Digital Insights, November – December 2025
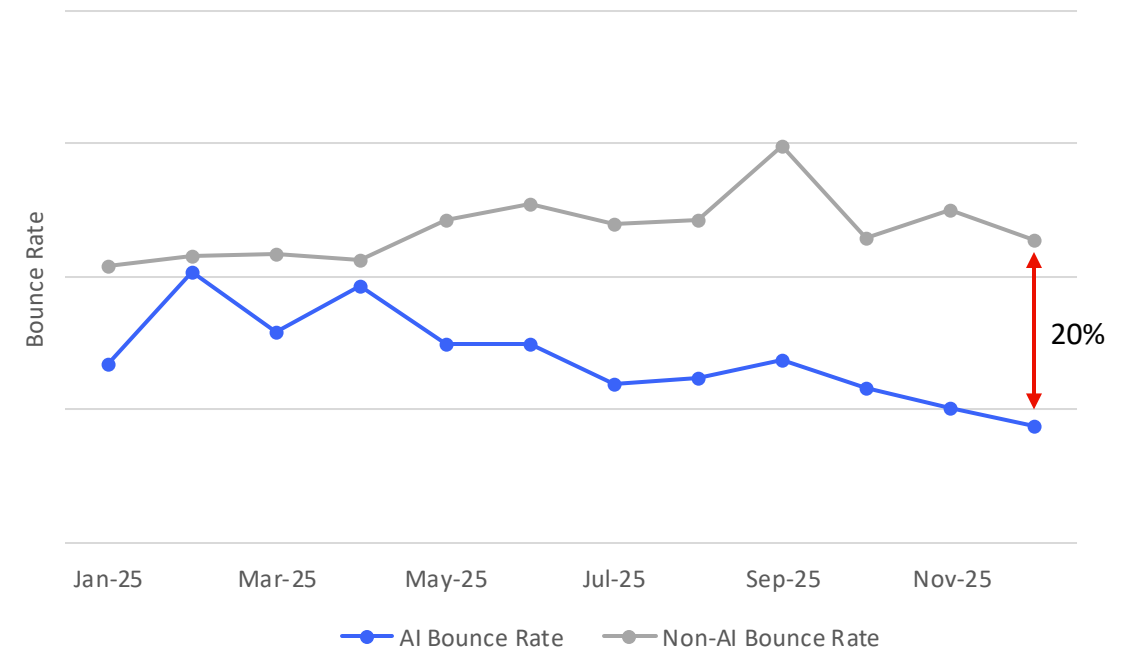
21%

AI   Non-AI

AI Referrals Bounce Less, Engage More (and Trust Outputs)

- During the 2025 holiday season, AI referrals were **20% less likely** to leave a financial services page immediately compared to non-AI sources.

- As a result, engagement rates (visits minus bounces) were **8.3%** higher for AI traffic than for traditional sources.

- The Holiday 2025 Adobe Consumer Survey results show consumer trust in AI for financial services is strengthening:

  - **85%** of consumers say they trust AI to provide financial recommendations without human input, and **47%** of those fully follow the advice.

Monthly AI vs. Non-AI Bounce Rate (Financial Services)

Adobe Digital Insights, January 2025 – December 2025
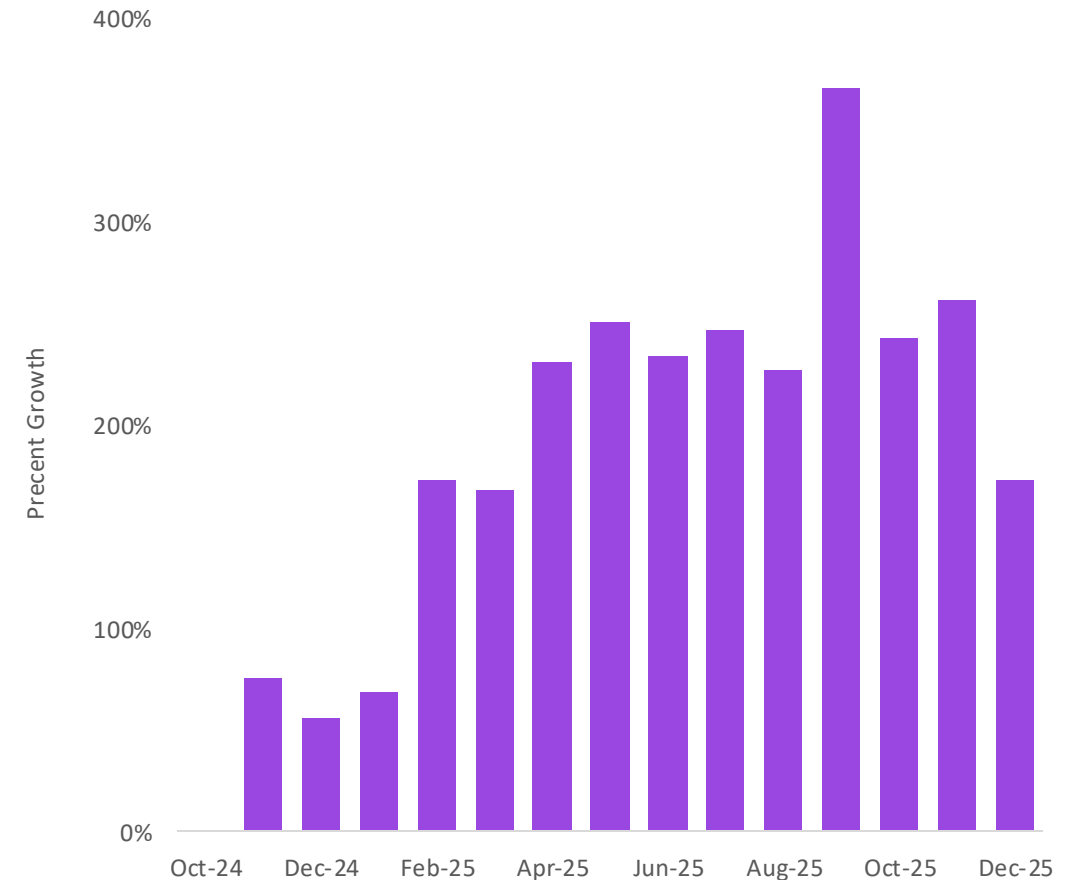

20%

AI Bounce Rate   Non-AI Bounce Rate

Media/Entertainment

Media/Entertainment Continues to See Consistent AI-Driven Growth

- This holiday season, **AI-driven visits to media/ entertainment sites increased 92% YoY**, with **+88% growth** since January 2025.

- According to the August 2025 Adobe Consumer Survey, **48% of consumers are using AI Assistants to engage with media/entertainment**, and **59% say they plan to do so in the near future.**

- Consumers use AI Assistants across a wide variety of media activities, including:
  - TV Shows or Movies: 59%
  - News and Current Events: 47%
  - Social Media and Influencer Content: 44%
  - Books and Podcast Recommendations: 27%

Growth in AI-Driven Visit Share (Media/Entertainment)

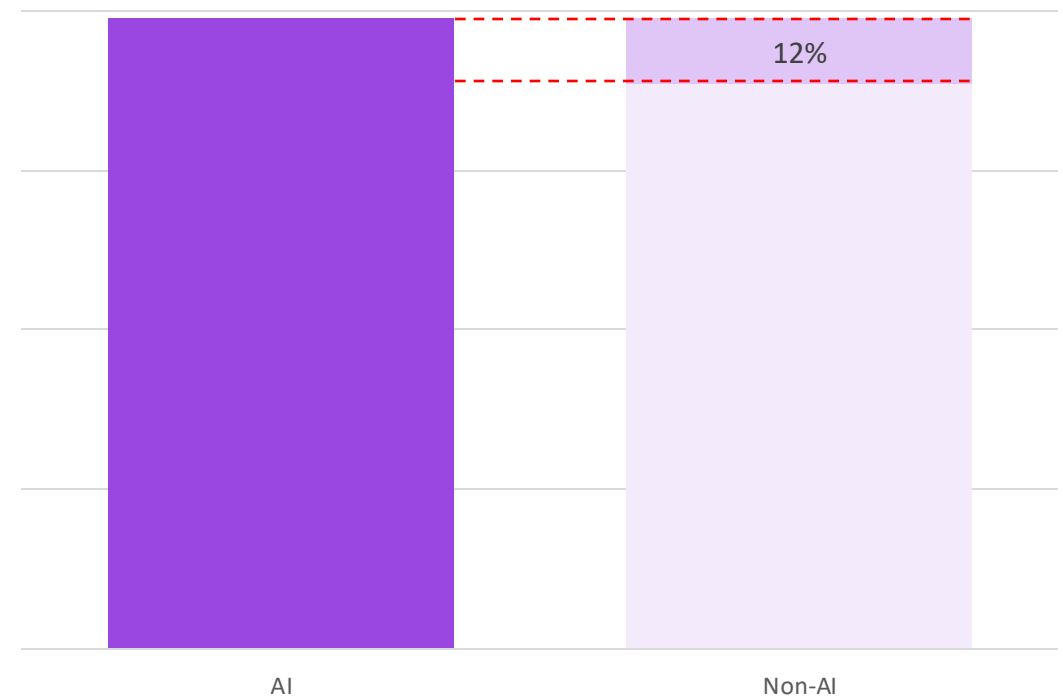Adobe Digital Insights, October 2024 – December 2025

AI Traffic Drives Sustained Gains in User Engagement

- AI referrals are attracting more research-oriented, highly engaged users, with AI-driven traffic **showing 12% higher engagement** (visits minus bounces) during the 2025 holiday season compared with non-AI sources.

- This engagement lift has persisted since November 2024, with AI-driven traffic **consistently delivering 13–18% higher engagement**, signaling a lasting shift in user behavior.

💡 Key Insight: Higher engagement from AI-referred traffic suggests that users are spending more time exploring content, likely because AI-generated results are more relevant and closely aligned with user intent. In fact, according to the August 2025 Adobe Consumer Survey, 47% of consumers using AI for media/entertainment purposes are likely to purchase the content that is recommended.

AI vs. Non-AI Engagement Rate (Media/Entertainment)
Adobe Digital Insights, November – December 2025
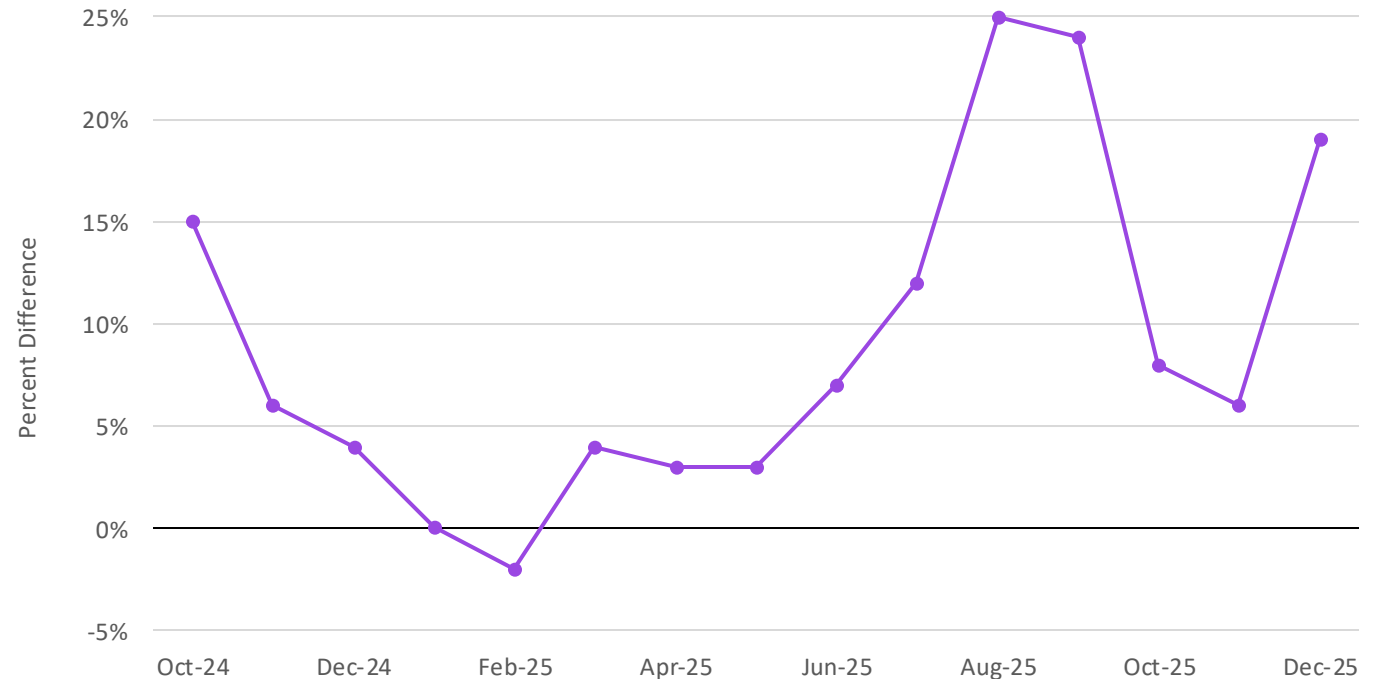
12%

AI

Non-AI

A Trend With Staying Power, AI Visitors Stay Longer on Media/Entertainment Sites

- AI is not only attracting more engaged users but is **sustaining its lead over non-AI referrals**, pointing to a lasting behavioral shift.

- Despite slight dips in October (8%) and November (6%) 2025, AI rebounded in December with a **strong 19%** lead, signaling sustained engagement during the holiday season.

Monthly AI vs. Non-AI Time Spent per Visit Percent Difference (Media/Entertainment)

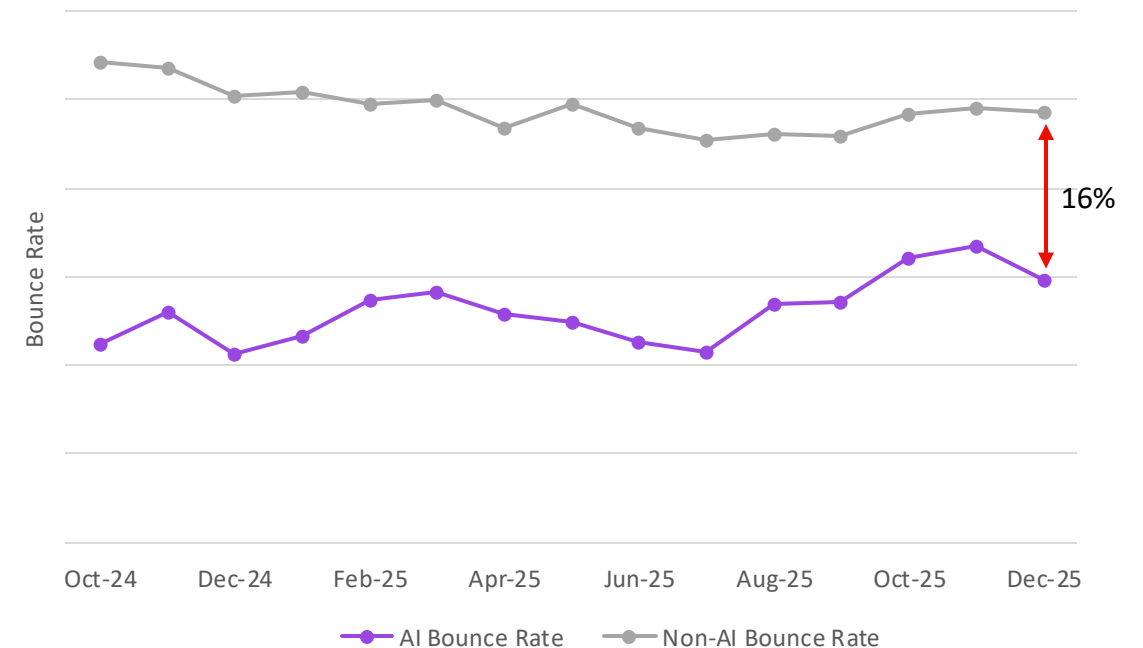Adobe Digital Insights, October 2024 – December 2025

AI Referrals Bounce Less, Signaling Stronger Content Alignment

- AI referrals **consistently outperform non-AI sources in bounce rate,** signaling stronger content relevance and higher user intent.

- As AI recommendations improve, bounce rates remain significantly lower—**16% lower than non-AI traffic in the 2025 holiday season.**

- The persistent gap in bounce rate reinforces AI's long-term advantage in driving more engaged, higher-quality visits.

💡 Key Insight: In the August 2025 Adobe Consumer Survey, 73% of consumers report that they are satisfied with the recommendations that AI provides in this space.

Monthly AI vs. Non-AI Bounce Rate (Media/Entertainment)

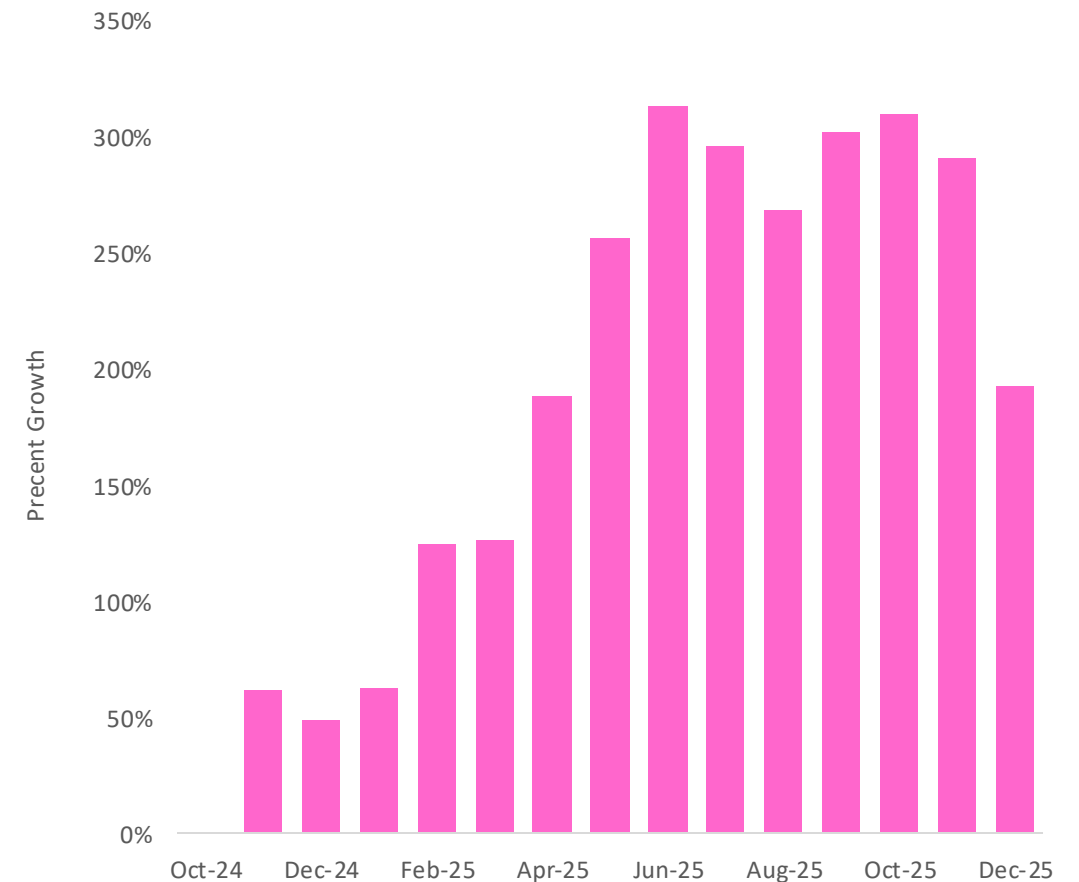Adobe Digital Insights, October 2024 – December 2025

16%

Bounce Rate

Oct-24 Dec-24 Feb-25 Apr-25 Jun-25 Aug-25 Oct-25 Dec-25

—●— AI Bounce Rate   —●— Non-AI Bounce Rate

Tech/Software

Tech/Software Industry Sees Notable AI-Powered Growth This Holiday

- During the 2025 holiday season, AI-driven visit share to tech/software sites rose **more than 120% YoY,** reflecting strong growth in the industry**.**

- Performance remained strong from July through November 2025, indicating a sustained high plateau in AI adoption.

- December showed a slight dip compared to November but remained well above early-year levels .

- In the August 2025 Adobe Consumer Survey, 48% of consumers report using AI to understand, troubleshoot, or make decisions about tech products/services, and 62% intend to do so in the near future.
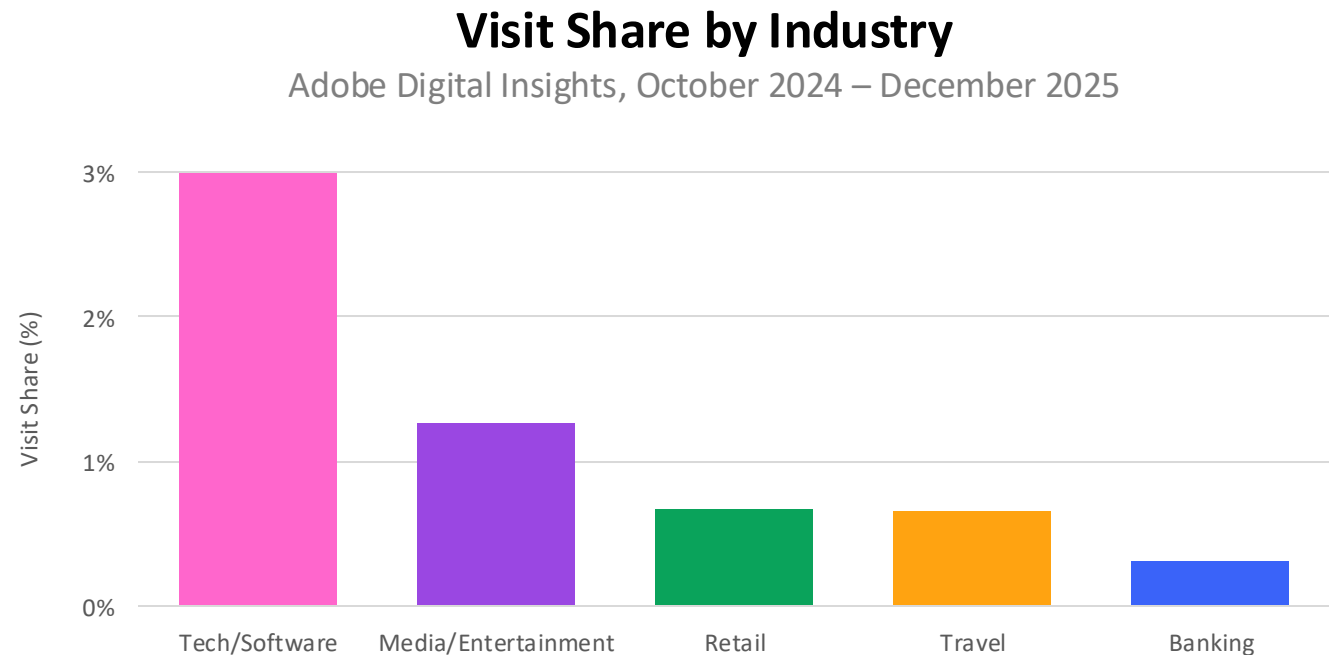
Growth in AI-Driven Visit Share (Tech/Software)

Adobe Digital Insights, October 2024 – December 2025

Tech/Software Leads Other Industries in AI Visit Share

- This holiday season, tech/software **led other industries** in AI-driven visit share, followed by media/entertainment, **highlighting AI's adoption in more technical and complex industries**.

- Tech/software visit share was **more than double** that of media/entertainment, **10 times more** than banking and about **5 times higher** than retail and travel.

- According to the August 2025 Adobe Consumer Survey, 28% of consumers report making a tech/software purchase with the help of AI.

- These purchases span a wide range of products, including:
  - Electronics: 37%
  - IT and Cloud Software: 14%
  - Cyber Security Software: 9%
  - Analytics and Infrastructure Tools: 6%

Visit Share by Industry
Adobe Digital Insights, October 2024 – December 2025

Bar chart — Visit Share (%) by industry:
- Tech/Software: 3%
- Media/Entertainment: ~1.3%
- Retail: ~0.65%
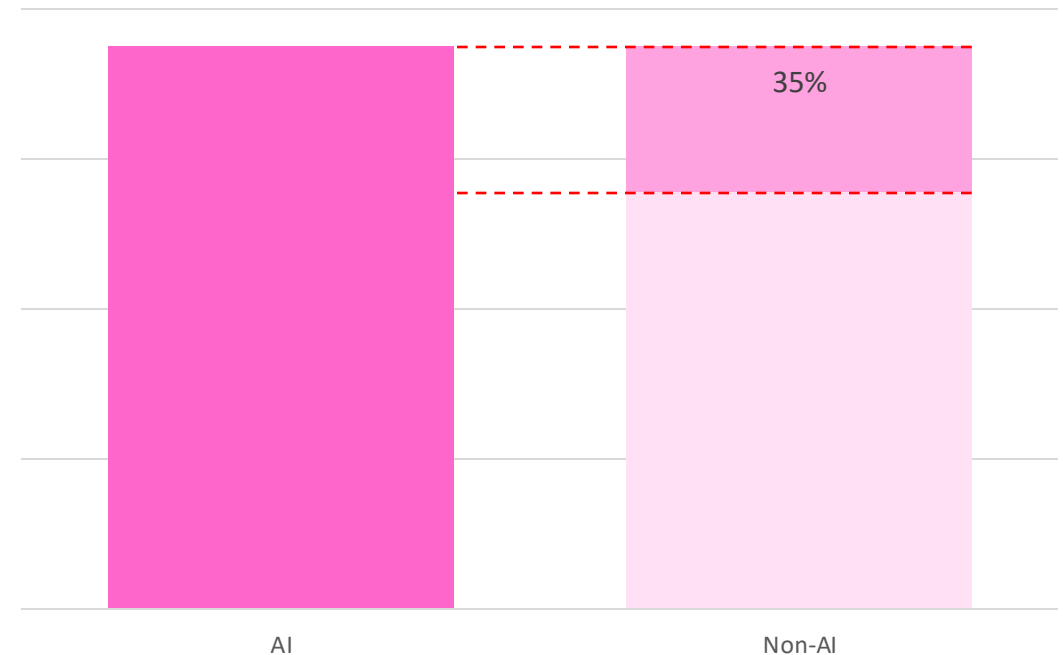- Travel: ~0.65%
- Banking: ~0.3%

AI Bounce Rate and Engagement in Tech/Software Significantly Outperform Any Other Industry

- This holiday season, **AI-driven visits to tech/software sites had a 35% higher engagement rate** (visits minus bounces) than non-AI sources—the largest gap compared with retail, travel, financial services and media/entertainment.

- **High engagement in tech/software indicated users are relying on AI for research and discovery** in complex, fast changing areas.

- Bounce rates are declining across all traffic, but AI is improving faster:

  - During the holiday season, the AI bounce rate for tech/software was **43% lower than non-AI**, further widening the engagement gap.

AI vs. Non-AI Engagement Rate (Tech/Software)

Adobe Digital Insights, November – December 2025

35%

AI   Non-AI

AI Visitors Stay Longer and View More on Tech/Software Sites, Outpacing Traditional Sources

- AI referrals are consistently driving more engaged visits, with users **spending more time and viewing more content per session**.

  - This holiday season, AI referrals **spent 46% more time** on tech/software sites and **viewed 22% more pages per visit** compared with non-AI referrals.

- This sustained lift in engagement underscores AI's growing ability to **guide users to more relevant and engaging resources**.
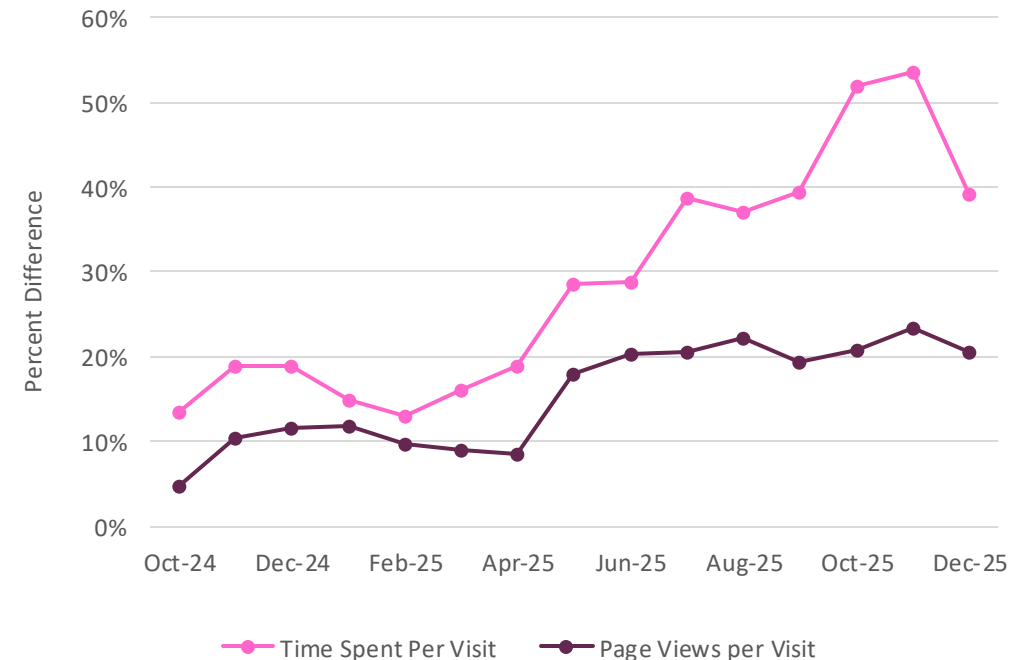
+46%
More time Spent

+22%
More Browsing Depth

Monthly AI vs. Non-AI Time Spent per Visit/Page Views per Visit Percent Difference (Tech/Software)

Adobe Digital Insights, October 2024 – December 2025

Legend: — Time Spent Per Visit   — Page Views per Visit

Y-axis: Percent Difference (0% – 60%)
X-axis: Oct-24, Dec-24, Feb-25, Apr-25, Jun-25, Aug-25, Oct-25, Dec-25