The Drum × HUMAN

The New AI-Powered Holiday Shopper

A marketer's guide to trust, traffic and growth in the agentic internet



01 The customer isn't always human

Identifying non-human traffic once meant determining whether a session came from a human or a bot, and automation was presumed bad. AI agents have broken that model. AI agents can now browse on a person's behalf, compare products, access accounts and complete tasks that look remarkably like the behavior of a high-intent customer. The machine may be doing the clicking, but there can still be a very real person – and purchase – behind it.

And the change is happening fast, with automated traffic growing eight times faster than human traffic. In the last year, traffic from AI agents has grown 7,851%, albeit from a very low starting point.

+7,851%

Growth in agentic AI traffic year-on-year

Source

+209%

Month-on-month growth in agentic traffic, September 2026

Source



"In September, 40% of the agentic traffic we saw was from Muse. By the end of the month, Muse generated over six times as much daily traffic on average as ChatGPT Agent. That explosive growth is creating the tipping point for brands."

Laura Hendricks, SVP of global sales, HUMAN



02 Who let the bots shop?

77%

of observed agentic traffic goes to retail and travel

Source

81%

of agentic AI activity was concentrated on product and search pages

Source

E-commerce was the largest destination sector in September, receiving 60% of observed agentic traffic. Product and search routes accounted for 81% of agent activity that month – suggesting that, for now, the dominant agentic behavior is exactly what shoppers do at the top of a buying journey: look around, research and compare.

This matters most during peak shopping periods. HUMAN's earlier research found that holiday demand intensified automated requests for live retail pricing, while agentic systems increasingly depend on fresh product, inventory and comparison data. That means the storefront is changing before the checkout necessarily does.



"We want to be wherever the customer is, and if they're finding us through AI tools, we need to provide the right level of service to that agent – or we could be turning away our best customer."

Elizabeth Perryman, head of marketing and sales enablement, Albertsons Media Collective

03 When bots mean business

Agents aren't only influencing what people find but are starting to buy, too. According to HUMAN, 73.8% of consumers would allow an AI agent to purchase on their behalf, albeit with limits on spending and product categories.

And that intent is becoming action. Checkout pages drew 2.45% of observed agentic activity in September 2026 – an early sign of agents reaching the point of purchase. For retailers, this opens a potentially valuable new route to demand, shifting the question from "how do we stop bots?" to "how do we help the right ones buy?"

73.8%

of consumers are willing to allow an AI agent to make a purchase on their behalf

Source

2.45%

of observed agentic activity occurs on checkout pages

Source



"We have to have a much tighter strategy. Before, it was possible for communications, corporate marketing, and paid marketing to sit separately, and now they can't because what feeds the LLMs is a combination of owned, earned and paid assets."

Amanda Forrester, SVP of marketing and communications, OpenX



04 Good bot, bad bot

1 in 5

site visits for a typical organization was a scraping attempt in 2025

Source

84%

of marketing leaders aren't confident their tools can separate malicious automation from high-intent AI agents

Source

There is, of course, a catch. An agent browsing products and heading towards checkout could be someone's efficient shopping assistant. Or it could be automated fraud. Across interactions analyzed by HUMAN, just half a percentage point separates the observed rates of benign and malicious automation. The behavior can look the same. The intent isn't.

That ambiguity creates a business dilemma: opening the doors to all AI traffic is as risky as blocking it entirely. For marketing and security teams, the challenge is shared: protect the business without protecting it from growth. And visibility remains the biggest hurdle.

Case study spotlight: Seeing the difference.

For one Fortune 100 retailer, bringing security, marketing and digital teams together around a shared view of traffic helps distinguish agentic discovery from agentic shopping behavior and build governance around different interactions. Full Case Study

Ready or bot?

Is your business ready for a customer you may never meet?

The holiday season's agentic commerce playbook starts with understanding who or what is already visiting your digital properties – and ensuring marketing, commerce and security teams have a shared response strategy.

Marketing and security often see the same traffic differently. One focuses on conversion and performance; the other on threats and risk. Without shared visibility, their priorities can work against each other.



The agentic readiness checklist

01 See — Know who – or what – is showing up.

Get a baseline view of human, traditional bot and AI-agent traffic across the full customer journey. Look beyond headline traffic volumes to understand which routes agents are using: search, products, accounts, authentication and checkout.

Ask: Could we quantify agentic traffic today if our CEO asked us?

02 Verify — Don't mistake identity for intent.

Knowing that something is automated is only the beginning. Understand what the actor is doing, whether its claimed identity can be trusted and whether its behavior represents legitimate customer intent or abuse.

Ask: Can we distinguish legitimate shopping agents from malicious automation?

03 Govern — Decide what different actors are allowed to do.

Move beyond a single allow/block rule. Define policies around particular actors, actions and levels of risk – and make those decisions jointly across marketing, product, commerce and security.

Ask: Do our teams agree on which agents we want to welcome, restrict or stop?

04 Enable — Make trusted automation a growth channel.

Once legitimate agents are identified and governed, remove barriers to trusted interactions. Measure their impact like any emerging channel, tracking discovery, conversion, customer value and fraud to identify growth opportunities.

Ask: If a trusted AI agent arrived ready to shop today, could it actually buy from us?

Decide who and what to trust, and turn legitimate agentic demand into growth without giving malicious automation a free pass.

To find out more, contact HUMAN

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