IPSOS VIEWS

# SHOPPING WITH AI

## How artificial intelligence is reshaping the purchase journey

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# Executive summary

**Artificial Intelligence (AI) is reshaping the shopper experience – but not in the ways many predicted.** Rather than replacing traditional touchpoints, AI is emerging as a powerful enhancement layer that makes shoppers smarter, faster, and more informed – while they retain ultimate decision-making authority.

In this paper, we draw on **Ipsos data across 15 markets[1] to explore where AI is gaining traction**, where shoppers are drawing firm boundaries, and why trust remains the critical variable. We offer practical guidance for brands and retailers navigating a future that demands both digital innovation and human connection – a "both/and" strategy, not "either/or".

**Among AI-aware consumers, 27% already use AI for product research, with 43% open to doing so.**

**Significantly for a capacity that barely existed two years ago, 9% would currently allow AI to make autonomous purchases.**

**Trust, not technology, determines adoption: a 50-point gap exists between highest and lowest trust markets.**



# Introduction – the AI paradox

At Ipsos, I'm one of those crazy people who cycle in London – legally, of course. Recently, it was time to retire my trusty steed for a new electric bike using our Cycle to Work scheme. And so, my path to purchase began.

I started with a simple Google search: a summary, a bunch of links, but I needed more. I switched to Gemini for a deeper dive. I listed everything – my height, gender, my current bike, the distance I cycle, where I store it overnight. After a bit of back and forth, I landed on a detailed comparison between two brands. And who doesn't love a side-by-side comparison table?

But something was missing. I needed to verify what I'd been told. I needed to get to know these brands beyond the specs. I needed to ask my cycling buddies about the models. I needed to ride it.

That's shopping in the age of AI: the machine compressed hours of research into minutes, but the final decision still required human touchpoints – expertise, social validation, and the feeling of handlebars under my palms.

## The paradox revealed

AI has reached a remarkable inflection point. Among consumers aware of AI tools, 27% are already using them to research products before buying, with another 43% open to doing so. Adoption is climbing steadily – you might expect shopping to be fundamentally transformed.

Yet our latest Ipsos Market Essentials data reveals a striking paradox: while openness to AI-assisted research is high, only 9% of consumers currently allow AI to make autonomous purchases, and only 24% would even consider it. That 9% is significant: a behaviour that barely existed two years ago is now practiced by nearly one in ten AI-aware consumers globally. This isn't the sudden AI revolution many predicted. It's something more nuanced: AI is becoming a powerful enhancement layer across the shopping ecosystem, not a replacement for it.

Chinese consumers are nearly twice as likely to use or consider using AI for research compared to French shoppers (90% vs. 54%). Yet even in AI-enthusiastic markets like India, traditional touchpoints remain vital for validation.

Think of it like Iron Man's JARVIS – incredibly capable AI that can process vast amounts of data instantly, but Tony Stark never lets it make the final call on anything that matters. Our data shows consumers want exactly this relationship: AI as their hyper-capable assistant, not their decision-making replacement.

## The consideration gap

Across every shopping task, 'would consider' outweighs 'currently use' by 2-3x (see Figure 1). This gap reveals both opportunity and context. The opportunity: significant untapped potential as AI becomes more integrated into shopping platforms. The context: we're still early in the adoption curve, and actual behaviour change takes time – integrated AI shopping tools are only now reaching mass availability.





**Figure 1:** The AI engagement spectrum

**From actual use to active resistance across shopping tasks**
*Q: Have you used or would you consider using AI tools (e.g., ChatGPT, Google Gemini, Copilot) for any of the following shopping-related activities?*

| Shopping task | Actual usage | Would consider | Would not use |
|---|---|---|---|
| **Information & research** | | | |
| Research products before buying | 27% | 43% | 22% |
| Understand product features/ specifications | 24% | 47% | 21% |
| Read/summarise product reviews | 23% | 44% | 25% |
| Compare prices across retailers | 21% | 47% | 23% |
| **Discovery & planning** | | | |
| Get gift ideas for others | 19% | 42% | 29% |
| Check product availability in stores | 16% | 44% | 30% |
| Find discount codes or deals | 15% | 49% | 25% |
| **Organisation & management** | | | |
| Plan purchases within budget | 14% | 42% | 33% |
| Find alternatives to out-of-stock items | 14% | 46% | 29% |
| Create shopping lists | 14% | 37% | 38% |
| **Service & support** | | | |
| Resolve issues with orders/returns | 12% | 39% | 37% |
| **Autonomous actions** | | | |
| Monitor prices and auto-buy when they drop | 12% | 42% | 35% |
| Have AI automatically purchase items | 9% | 24% | 52% |

Source: Ipsos Market Essentials, March 2026

Base: 7,954 consumers aware of AI tools across 15 markets

## The trust deficit: why touchpoints persist

The persistence of traditional touchpoints stems from a fundamental trust deficit. Our data shows 71% believe AI could be dangerous and should be approached with caution.

Only 45% trust companies using AI to protect their personal data – dropping to 25% in Canada while reaching 73% in India.

**This trust varies dramatically across demographics:**

- **Generational:** 48% of Gen Z trust AI with data vs. 33% of Boomers.
- **Income:** 53% high-income vs. 35% low-income.
- **Regional:** From 73% in India to 25% in Canada.

Leading brands understand this trust challenge. Walmart's approach is instructive: their AI shopping assistant Sparky is explicitly positioned as a helper, not a decision-maker. Customers retain full control while gaining AI-powered efficiency. This isn't technological limitation; it's strategic restraint that acknowledges the trust barriers that 71% of consumers feel.

Trust directly correlates with usage (see Figure 2). In markets with high AI trust, we see higher adoption: China (68% trust, 45% research usage) compared to France (26% trust, 19% research usage). The United States sits in the middle: 39% trust companies using AI with their data, and we see 26% using AI for product research – proportional to the trust level.

**Figure 2:** Regional trust shapes AI boundaries

**Trust companies using AI to protect personal data (%)**

| High trust markets: | |
|---|---|
| India: | 73% |
| China: | 68% |
| Mexico: | 56% |
| Brazil: | 54% |

| Lower trust markets: | |
|---|---|
| United States: | 39% |
| Germany: | 36% |
| UK: | 31% |
| Japan: | 28% |
| France: | 26% |
| Canada: | 25% |

Source:
Ipsos Essentials Q1 2026

Base:
8,545 across 15 markets







## The brand and retailer dilemma

For brands and retailers, this creates unprecedented tension. You're being asked to:

- **Innovate with AI** to stay competitive while also delivering immersive, personal experiences;
- **Reduce operating costs** through automation while maintaining **human touchpoints** customers still demand;
- **Personalise at scale** when only **45% trust** companies using AI with their data;
- **Standardise globally** despite 50-point gaps in AI acceptance between markets.

**The pressure is real:** How do you justify AI investment when ROI is unclear? How do you allocate budgets between digital innovation and store experience? Which touchpoints can you safely automate without losing customers? Which are worth maintaining or investing more in to balance the influence of AI? The answer isn't choosing sides – it's understanding exactly where AI adds value in YOUR category's purchase journey.

# AI as an assistant, not an authority

Our research reveals a clear hierarchy of AI acceptance based on control:

### Where AI thrives: information tasks

Consumers readily embrace AI for research and comparison: 67-71% either use or would consider using AI for these tasks. They recognise AI's ability to process vast information quickly. A shopper can instantly compare dozens of TV models, compressing hours of research into minutes.

### Real-world success: enhancement, not replacement

Leading retailers demonstrate this assistant model effectively:

- **Walmart's Sparky** Gen AI-powered shopping assistant exemplifies the shift from "search" to "intent-driven commerce." Rather than replacing the shopping experience, Sparky enhances it – helping shoppers build baskets 35% larger[2] than traditional search by suggesting complementary items (the charcoal and tongs for your BBQ). Crucially, Sparky remains an assistant: it suggests and helps, but the shopper retains full control over every purchase decision.

- **Carrefour's Smart Carts** in France use AI to suggest recipes based on items already in your basket[3] – shortening the path from discovery to purchase while maintaining the tangible, in-store experience shoppers value. This approach also delivers peripheral benefits: reducing food waste through better meal planning and supporting healthier eating through personalised menu suggestions. These secondary benefits may prove as important as the core shopping efficiency in driving AI adoption.

### Where humans prevail: decision authority

Even for creating shopping lists – a relatively low-stakes task – 38% explicitly reject using AI today. This resistance intensifies with purchase value (see Figure 3): Americans who would consider AI assistance limit it to purchases under $10 (22%), under $50 (26%), or under $100 (23%).

**Most revealing:** only 24% would allow AI to "pick what it thinks is best." The majority want AI constrained to brands they already purchase most often (29%) or have purchased before (16%).

> **Consumers readily embrace AI for research and comparison: 67-71% either use or would consider using AI for these tasks.**





This finding is significant for brand strategy: AI executes on existing preferences – it doesn't create them (yet). Brand building through traditional touchpoints remains essential for competitive advantage.

### The control imperative: US deep dive

Recent Ipsos US[4] research crystallises this control dynamic:

- **Just 15%** would give AI full purchasing autonomy – 85% require either outright approval or conditions based on product and cost.
- **Only 4%** of Gen X/Boomers permit fully autonomous purchasing.
- **55%** want fair outcomes in terms of value for both buyer and seller, not just lowest price.
- **57%** want to see AI's reasoning every time it makes recommendations.

This demand for transparency isn't about understanding algorithms – it's about maintaining human authority over decisions that matter.



**Figure 3:** The authority spectrum

**Americans' comfort with autonomous AI purchasing by value**

| Purchase value | Would allow AI to purchase |
|---|---|
| Under $10 | **22%** |
| $10-49 | **26%** |
| $50-99 | **23%** |
| $100-249 | **16%** |
| $250+ | **8%** |

Source: Ipsos AI in Spending & Finance Poll, February 2026

Base: n=557 Among those who would let AI purchase depending on product/cost



> The path forward isn't uniform. Our data reveals patterns that require nuanced, market-specific strategies.

# Market and generational realities

The path forward isn't uniform. Our data reveals patterns that require nuanced, market-specific strategies:

### The generational spectrum

- **Gen Z (43% regular AI use):** High AI literacy but 48% explicitly reject autonomous purchasing.
- **Millennials (38% regular AI use):** Time-pressed, using AI for efficiency while maintaining control, most likely to trust companies using AI.
- **Gen X (29% regular AI use):** Tactical adoption with scepticism about ceding authority. More likely to use AI for information gathering than task management.
- **Boomers (18% regular AI use):** 69% explicitly reject auto-purchase but increasingly use AI for specific information tasks.

**What this means:** A Gen Z-focused brand needs AI that supports social sharing and peer validation. A brand targeting time-pressed Millennials can lean harder into efficiency messaging. Strategies targeting Boomers should emphasise AI as information enhancer, not decision-maker.





### The market mosaic:

Different markets require dramatically different AI strategies (see Figure 4):

**AI-forward (China, India):** While 60-66% express openness to auto-purchase, actual usage tells a different story: 21% in China and 24% in India have actually done it. These markets are ready for sophisticated AI integration, but traditional touchpoints remain vital even among enthusiastic adopters.

**AI-cautious (Japan, France, Germany, Canada, UK):** Only 16-22% show openness to auto-purchase despite high digital sophistication. Actual usage barely registers at 2-4%. In these markets, AI must enhance experiences behind-the-scenes rather than take centre stage.

**AI-ambivalent (US, Brazil, South Korea):** True middle ground with 32-45% openness – willing to consider AI assistance but demanding transparency and control. The US shows 9% actual usage, higher than cautious markets but well below AI-forward nations.

**What this means:** Global brands cannot deploy uniform AI strategies. An approach that delights shoppers in Shanghai may alienate customers in Paris. Market-specific calibration is essential.

**Figure 4:** Market patterns reveal different needs

**% Who would use AI for shopping tasks (currently using or would consider)**

| Task | Highest markets | | Lowest markets | | |
|---|---|---|---|---|---|
| | China | India | Japan | France | Canada |
| Research products | 90% | 84% | 51% | 54% | 66% |
| Auto-purchase | 66% | 60% | 16% | 17% | 16% |
| Price monitor & buy | 76% | 75% | 26% | 38% | 48% |

Source: Ipsos Essentials March 2026

Base: 7,954 aware of AI tools

# Implications: designing for convergence

The data points to clear strategic imperatives for brands and retailers navigating this landscape.

## Map authority by category:

Consumers have clear boundaries around what they'll delegate to AI. Companies need to understand where their products fall on this authority spectrum:

**By purchase value (US data):**

- 48% would allow AI purchases under $50 without approval.
- This drops to 16% for purchases over $100.
- Only 8% are comfortable with AI spending $250+ autonomously.

**By shopping task (global data):**

- **High openness (67-71% currently use or would consider using):** Research products, understand features, compare prices, read reviews.
- **Medium openness (51-61%):** Create shopping lists, plan budgets, find alternatives, get gift ideas.
- **Lower openness (33%):** Automatic purchasing without human approval.



> 48% would allow AI purchases under $50 without approval.





**By market context:** The authority threshold varies dramatically by geography. For autonomous purchasing:

- **High acceptance:** China (66%), India (60%) – though actual usage today is only 21% and 24%, respectively.
- **Medium acceptance:** Brazil (45%), South Korea (37%).
- **Low acceptance:** Canada (16%), France (17%), Germany (17%), Japan (16%) – with actual usage at 2-4%.
- **Action:** Audit your category against these thresholds. If you sell high-value items, focus on AI as research assistant. If you sell low-value replenishment items, you have more latitude for automation – though the current economic environment and cost-of-living pressures may make price comparison more attractive than automated convenience purchasing.

**By category:** Different product categories have different AI potential:

- **Replenishment items (household basics, batteries):** Higher automation potential, though even here only a third show openness to autonomous purchasing.
- **Experience goods (clothing, entertainment, software):** AI for research and comparison, human for final decision.
- **Considered purchases (electronics, alcohol, premium items):** AI to narrow options, human touchpoints to convert.
- **Trust-intensive goods (baby products, health):** While final purchase decisions require maximum human involvement, there's significant potential for AI in advice, wellness planning, and navigating overwhelming choices – new parents, for instance, often fall into the "too busy not to rely on AI" category.

## Invest in preference creation

AI primarily executes on existing preferences, but is increasingly contributing to creating them. When US consumers were asked how AI should select products:

- **29%** want it to buy brands they already purchase most often.
- **24%** would let AI pick what it thinks is best.
- **17%** would let AI pick the least expensive item from a provided list.
- **16%** want it limited to brands they've bought before.
- **15%** would let AI pick the least expensive item as long as it had good reviews.

**The majority still want brand control.** When we group these responses by who holds decision authority:

**Brand-constrained (62%):** These consumers want AI working within boundaries they've already set:

- Brands they already buy most often (29%).
- Least expensive from a list they provide (17%).
- Limited to brands they've bought before (16%).

**AI-Autonomous (39%):** These consumers give AI true latitude to make or influence the brand choice:

- Let AI pick what it thinks is best (24%).
- Least expensive with good reviews (15%).

**The strategic implication is clear:** Nearly two-thirds of consumers see AI as an executor of their existing preferences, not a replacement for their judgement. Traditional touchpoints – wherever brand preferences are actually formed – remain crucial (see Figure 5). Since AI executes rather than creates preferences for the majority, competitive advantage shifts to preference-building through experiences, content, and community that AI cannot replicate.

But don't ignore the 39% willing to let AI lead. For these value-seekers, brand loyalty may not survive the AI layer. Building genuine preference – not just habitual repurchase – becomes essential when AI can redirect nearly four in ten consumers toward alternatives.

## Design for transparency

Most Americans who would let AI purchase for them would still want to see AI's reasoning (57%), only 28% would be confident enough in the AI's choices to not be shown the reasoning automatically: make AI's logic visible, not mysterious. Show your work. Explain recommendations. Give customers the information they need to validate AI suggestions through their own judgement.

This isn't just about building trust – it's about recognising that transparency itself is a feature. Customers don't want a black box that produces answers; they want a capable assistant that explains its thinking. The brands that make AI reasoning accessible will build deeper trust than those that simply assert "our AI recommends…"

Consider building in explicit validation steps: "Here's what I found and why. Want to compare prices yourself? Read the full reviews? Check with friends?" Transparency means giving customers the tools to verify, not just the answer to accept.

## Enhance human touchpoints

Don't replace humans – make them smarter. AI provides knowledge while humans provide judgement and connection.

Retail employees equipped with AI tools become super-advisors, armed with instant product knowledge and personalised recommendations. The sales associate isn't replaced; they're elevated into a role that combines AI-powered information with human empathy and expertise.

This is where the true value of human touchpoints becomes clear: not just handling transactions but building the emotional connections that create preference, loyalty and providing the affirmation in AI-inspired choices that drives purchase confidence. AI can tell you a product's specifications; a knowledgeable human can tell you which one they'd buy for their own family.





## Respect regional realities

With 50-point gaps in AI acceptance between markets, develop strategies that match local trust levels and preferences. This isn't about simply localising language – it's about fundamentally different strategic approaches.

In AI-forward markets (China, India): Lean into AI capabilities. Shoppers here are ready for sophisticated integration, and holding back may feel dated. But remember: even in these markets, 28-29% explicitly reject autonomous purchasing, and actual usage (21-24%) remains well below stated openness. Traditional touchpoints matter everywhere.

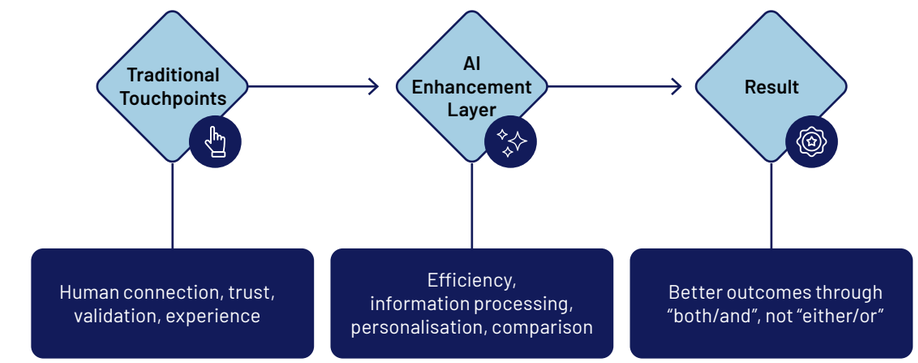
In AI-cautious markets (Japan, France, Canada): AI should enhance behind-the-scenes rather than take centre stage. Focus on using AI to improve human interactions – better-informed staff, smoother logistics, personalised service – rather than customer-facing AI features that may trigger distrust.

In AI-ambivalent markets (US, Brazil): Offer choice and control. Let customers opt into AI features rather than defaulting them on. Emphasise transparency and human override at every step.

The cultural roots of these differences run deep. In markets like Canada, institutions are generally trusted but technology must prove itself; AI is seen as potential disruption to stable lives. In markets like India, AI is often positioned as a path to upward mobility and modernisation – disruption as opportunity rather than threat.

**Figure 5:** The convergent framework

**AI enhances each stage without replacing the journey**




Source: Ipsos

## Conclusion: the future is both/and

Our data across 15 markets tells a clear story: shoppers want AI to enhance their journey, not replace it. Among AI-aware consumers, 27% already use AI for product research, with 43% open to doing so. For autonomous purchasing, just 9% are active users today – meaningful early adoption, but a clear boundary. Even among Gen Z, 48% explicitly reject it. Even in China, our most AI-forward market, 28% draw a firm line.

Last month, Gemini helped me choose a new e-bike – specs, reviews, price comparisons in minutes. But I didn't click "buy." I checked Reddit, texted cycling friends, and walked into a shop to throw my leg over both frames. AI got me to the final two. Human touchpoints – social validation, expert advice, physical experience – got me to the final one.

That's the future of shopping. AI makes us superhuman at processing information; we remain fundamentally human in our need for trust, connection, and verification. This isn't AI's failure, it's recognition of its current role.

The winners won't have the most advanced AI or the most traditional approach. They'll orchestrate both by using AI to eliminate friction while preserving human moments that build preference, trust, and loyalty. Your customers are demanding nothing less.

**Ipsos Market Essentials**

Unless stated otherwise, the figures cited in this paper refer to data collected from our Ipsos Market Essentials database.

For more information, please visit: www.ipsos.com/en/market-essentials-did-you-know-monthly-digest-consumers-behaviour-across-world





## How Ipsos can help

Through our **Path-to-Purchase**[5] research, we guide your AI-enhanced commerce strategy:

### 1. Map your current touchpoint ecosystem

- Map how touchpoints interact with each other, including how use of AI tools connects to other digital and physical touchpoints.
- Understand which moments matter most to your shoppers along the path to purchase and deliver on those needs.
- Measure the role AI currently plays vs. traditional touchpoints at each stage of the journey.

### 2. Identify enhancement opportunities

- Where can AI strengthen existing touchpoints rather than replace them?
- Benchmark current AI usage in your category's purchase journey against shopper expectations.
- Design AI strategies that respect current market-specific trust levels and preferences.

### 3. Optimise your brand's AI presence

- How do consumers navigate brand information online?
- Compare brand visibility in AI searches with competitors to make your brand/product/service LLM/ Agent optimised.
- Identify opportunities to improve brand presence in AI-powered discovery.

### 4. Test and learn with humility

- Remember, 55% of people fear computers becoming too smart – move thoughtfully.
- Our continuous measurement tracks evolving AI adoption and resistance patterns.
- Monitor competitive AI innovations and shopper response.

### 5. Prepare for the both/and future

- Invest in AI capabilities AND human experiences.
- Measure ROI of AI-enhanced vs. traditional touchpoints.
- Build strategies that orchestrate both for maximum impact.
- Monitor shopper readiness and trust with AI shopping through our Ipsos Essentials data.

# Endnotes


1 Ipsos Market Essentials. 8,500 adults under the age of 75 across 15 countries, interviewed between February-April, 2026.

2 Modern Retail. (2026). "Walmart says AI users build 35% bigger baskets than others." https://www.modernretail.co/technology/walmart-says-ai-users-build-35-bigger-baskets-than-others/

3 Retail Technology Innovation Hub. (2026). "Retail Technology Innovation of the Week: Carrefour Embraces ChatGPT Powered Grocery Shopping." https://retailtechinnovationhub.com/home/2026/4/1/retail-technology-innovation-of-the-week-carrefour-embraces-chatgpt-powered-grocery-shopping

4 Ipsos AI in Spending & Finance Poll. 1,500 US adults aged 18-65, interviewed 8 February, 2026.

5 Ipsos. "Path to Purchase." Accessed 10 July, 2026. https://www.ipsos.com/en/path-purchase






# Further reading





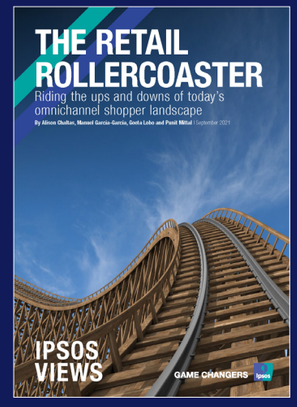










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