

The AI-Powered Purchase Journey

*What's Changing
and What's Next
for Tech Consumers*

NielsenIQ

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Today's Session Leaders



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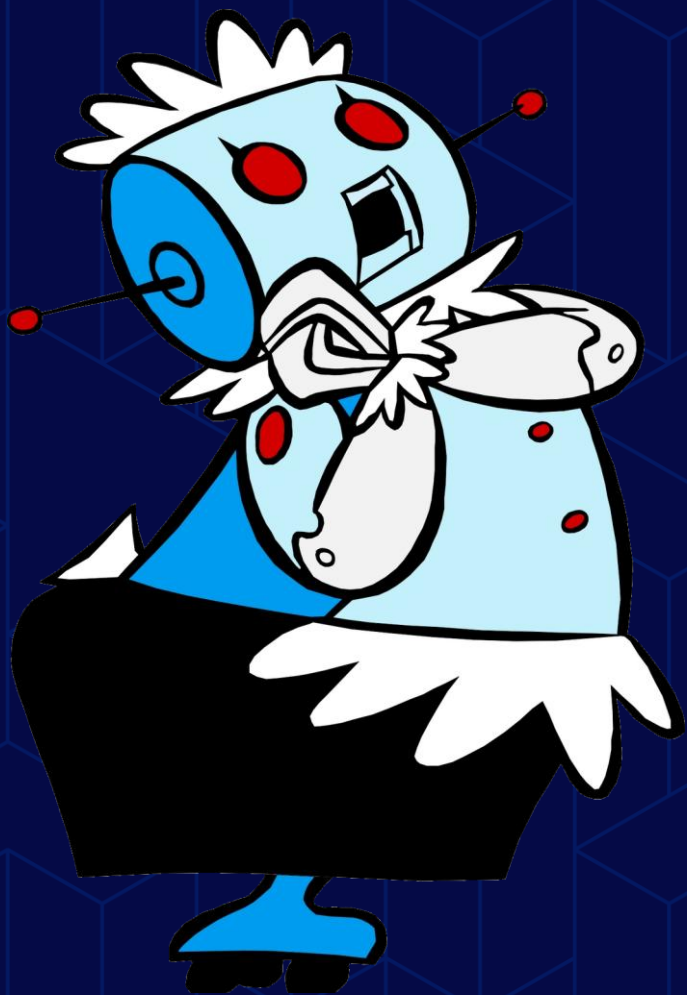
Agenda

- *The Evolving AI Landscape*
- *The State of Agentic Commerce*
- *What Does This Mean?*

Data from multiple NIQ studies is referenced in today's presentation:

- *Consumer Life*
- *Agentic Commerce Tracker*
- *Newron Consumer*

The Evolving AI Landscape



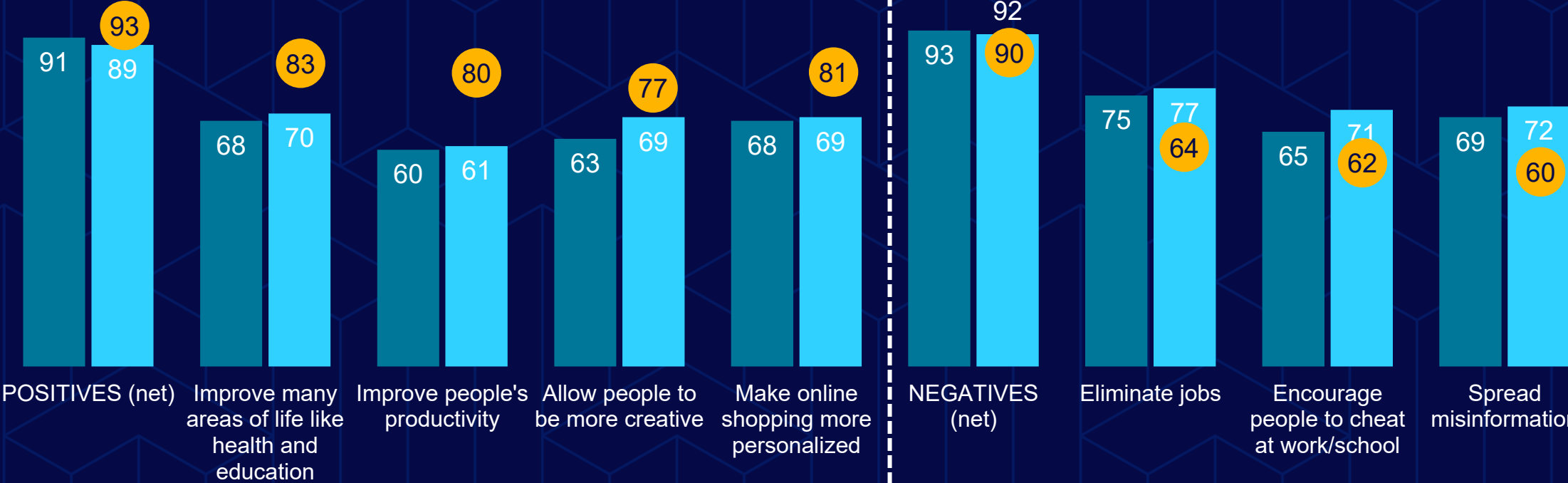
Most Americans are hopeful that AI will enhance their lives, from creativity to commerce

Although negative perceptions of AI's impact remain strong

“37% of Americans think the potential benefits of AI outweigh the possible harm

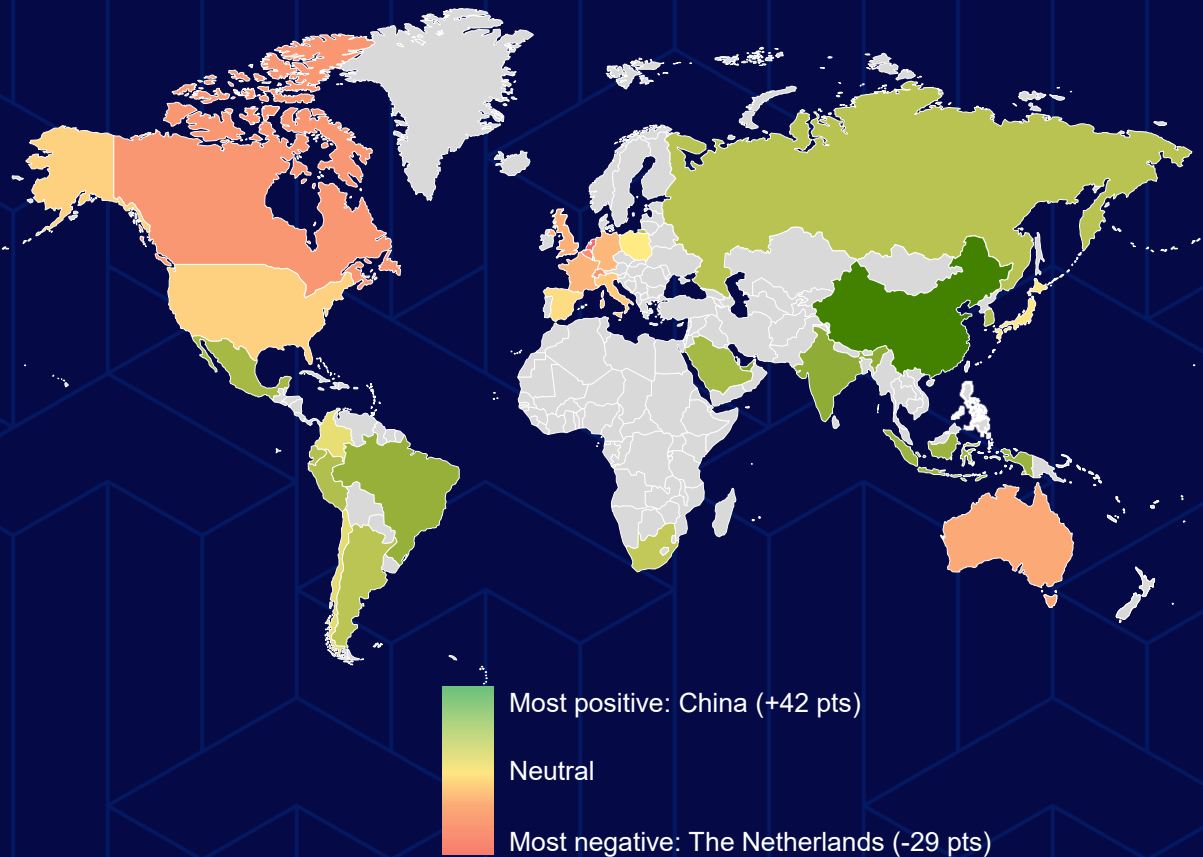
% of Americans who agree that AI will...

■ 2024 ■ 2026 ● Global 2026

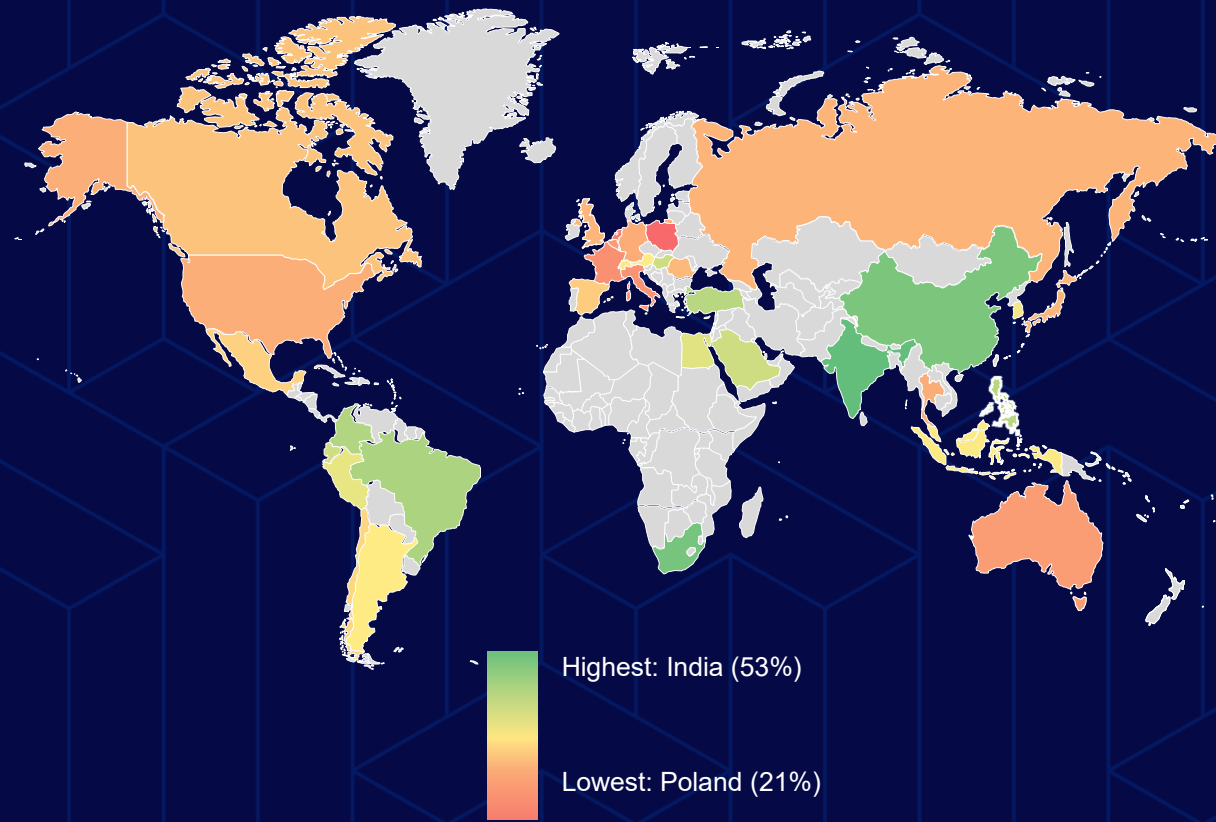


Western developed markets like the US lag behind China and other developing markets in AI optimism and usage

*Pt diff. between the share of consumers citing positive associations with AI and those citing negative ones**



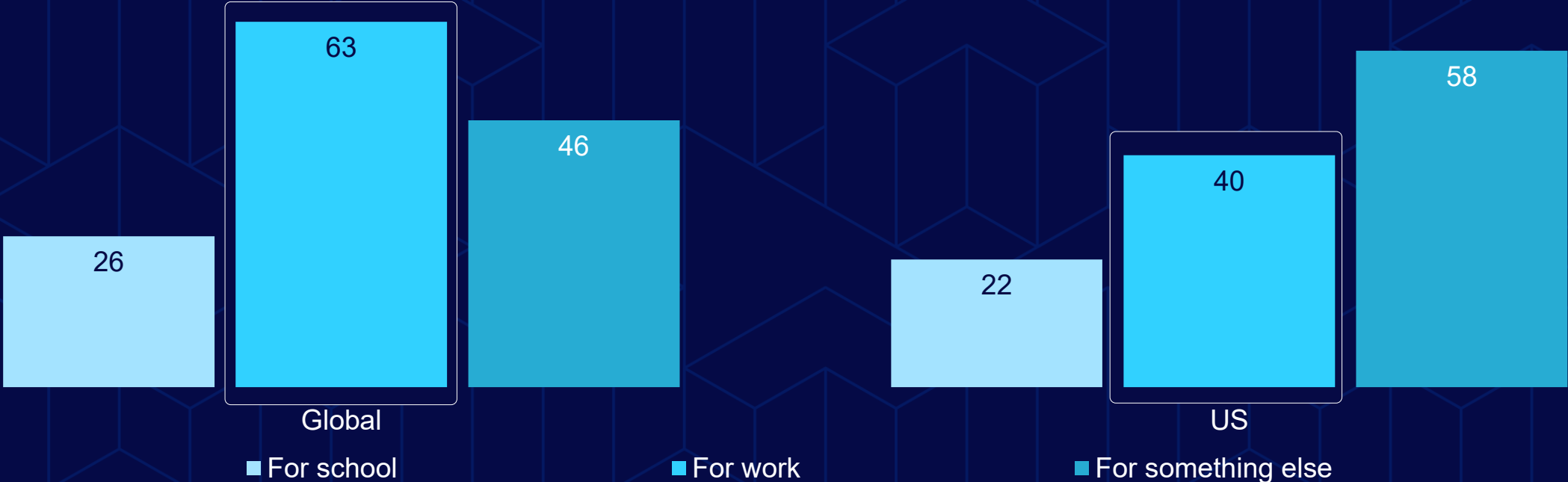
% who used AI apps or tools in the past 30 days, 2026



NIQ Consumer Life Global 2024, O32 (global = 28 countries), *Positives include AI improving productivity, improving many aspects of life, enabling creativity, and making online shopping more personalized; negatives include AI eliminating jobs, encouraging people to cheat, spreading fake news

Adoption of AI in work settings lags in the US

% who used AI for the following
(based on those who used AI tools or apps in the past 30 days)

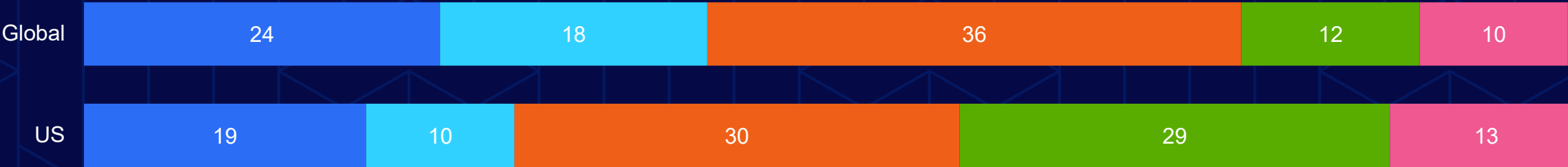


AI-integrated devices will not be an easy sell

Some will take a “wait and see” approach

% of consumers who feel the following about devices featuring AI

■ Already bought a device featuring AI ■ Can't wait to get one ■ Interested but will wait until other people try first ■ Not interested ■ Don't know much about such devices



37%

of Americans agree
“I would rely more on voice assistants such as Amazon Alexa and Apple Siri if they **understood and could converse with me better**”

-12 pts from global average

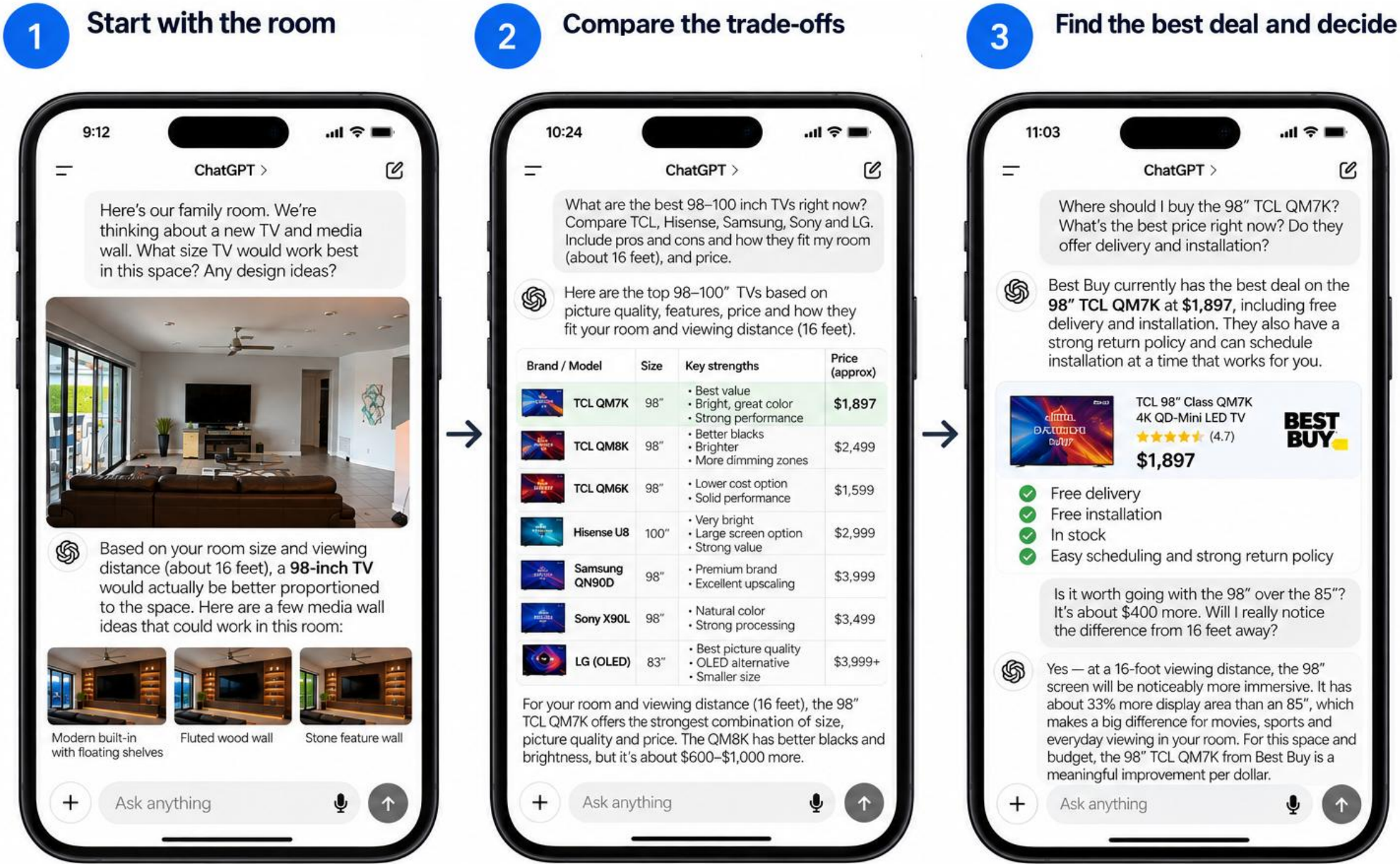
What will be the catalyst for the USA reaching a tipping point in adoption?



The State of Agentic Commerce

From a room-design question to a purchase decision

How one shopper used AI across the entire path to purchase



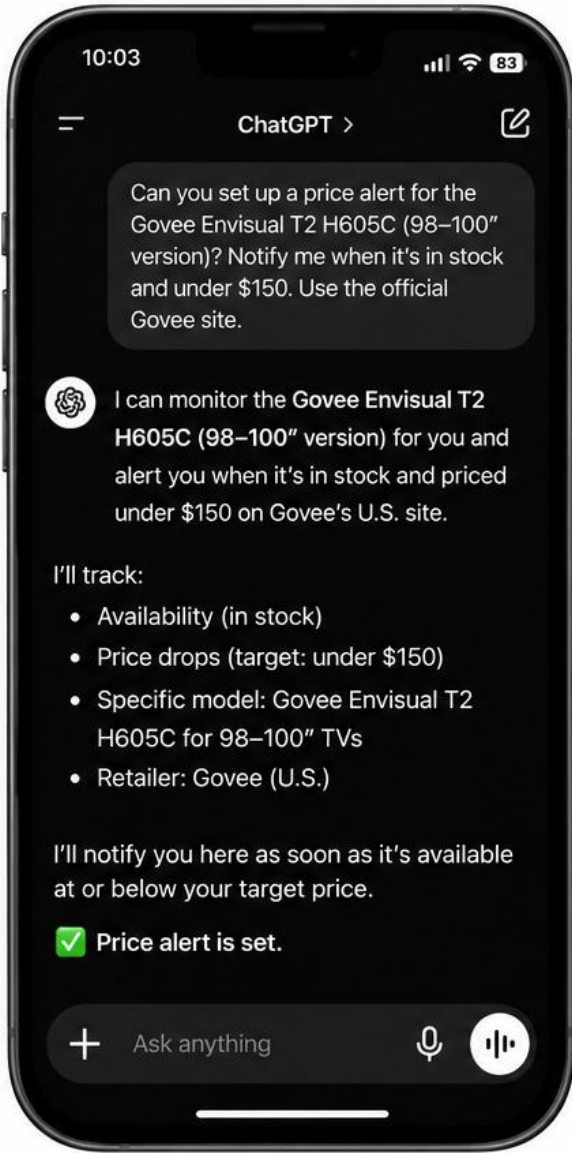
Using AI to track prices and get alerts

How one shopper used AI to monitor availability and price drops

1

Set up a price alert

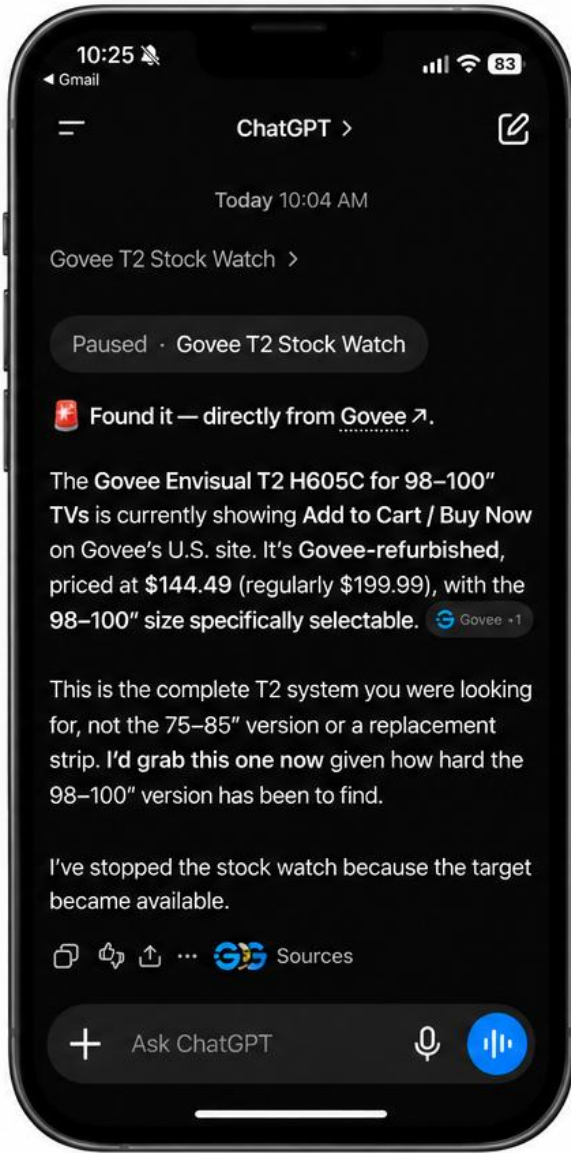
He asked ChatGPT to monitor the exact TV model for availability and notify him when the target price was reached.



2

Get notified when the price drops

ChatGPT monitored the retailer and alerted him as soon as the exact model was in stock at \$144.49 — below his target price.



Illustrative reconstruction from recovered case-study notes; not verbatim chat screenshots.



Half of shoppers already use agentic commerce for shopping

Future interest remains high, with almost two-thirds considering AI tools

74%
for recent
T&D buyers

51% have used at least one AI tool to shop within the past month

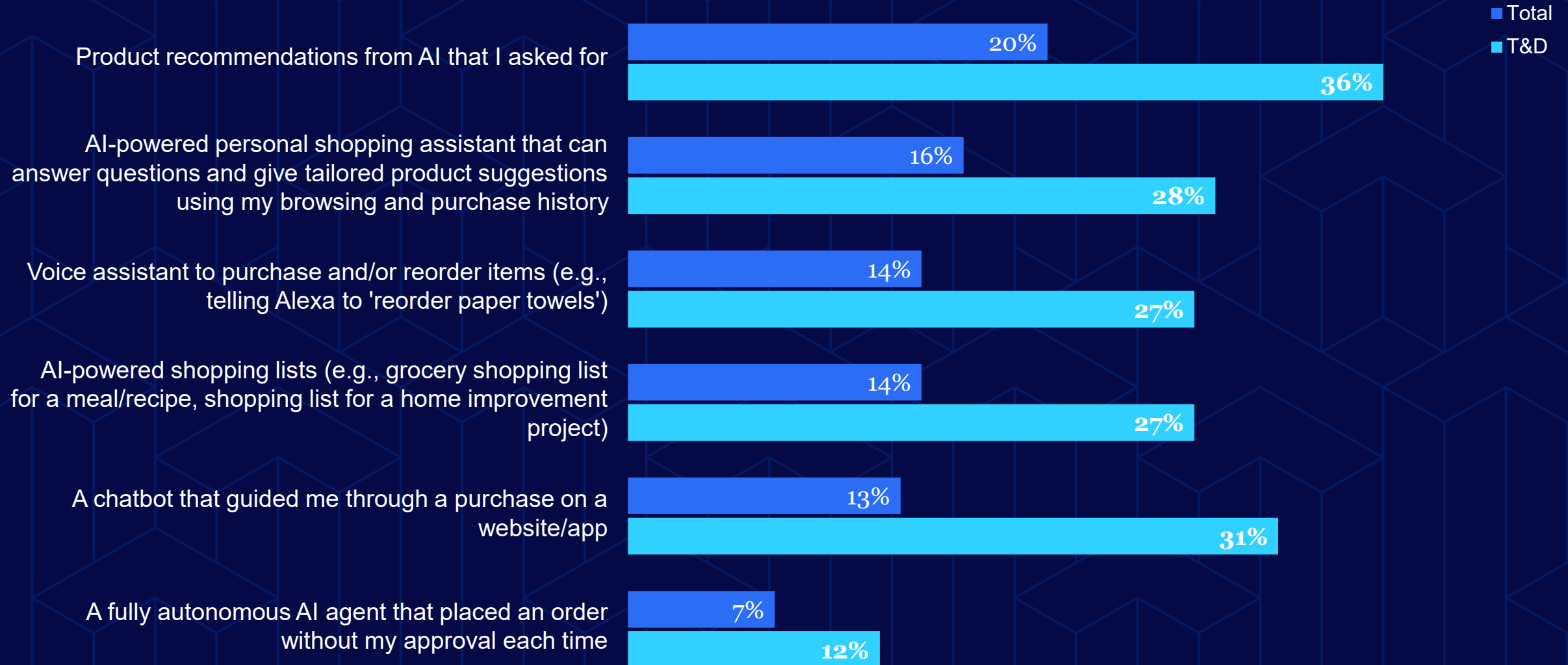
82%
for recent
T&D buyers

61% have considered using at least one AI tool to shop

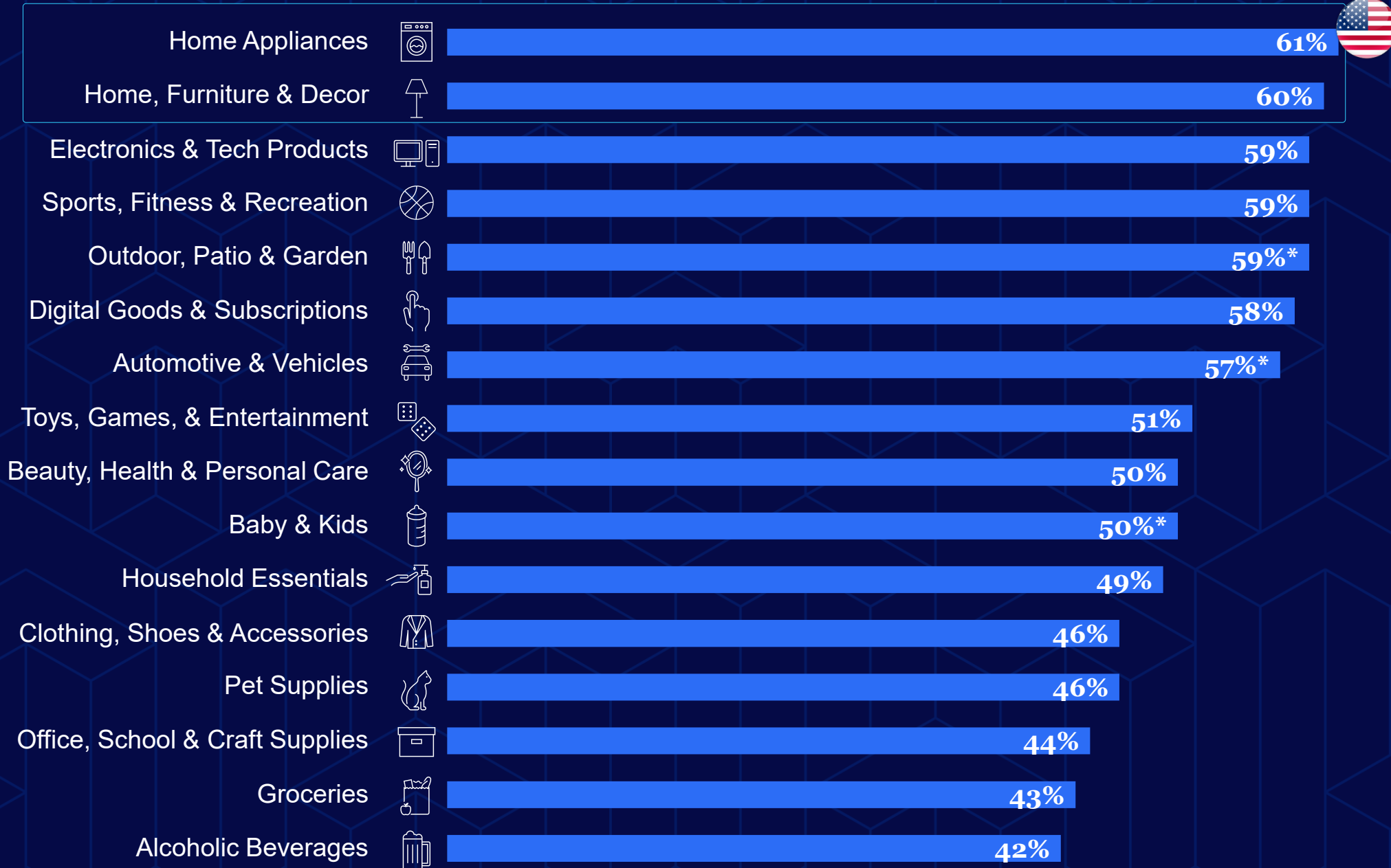




AI-powered recommendations continue to be the leading shopping tool. Use of a fully autonomous agent remains a less likely way to use AI for shopping.



Home Appliances and Home Furniture & Décor continue to be the lead categories for agentic commerce usage





Top motivations to use AI for shopping

Cost saving
is the primary
reason consumers
use AI tools for
shopping,
followed by
saving time and
effort

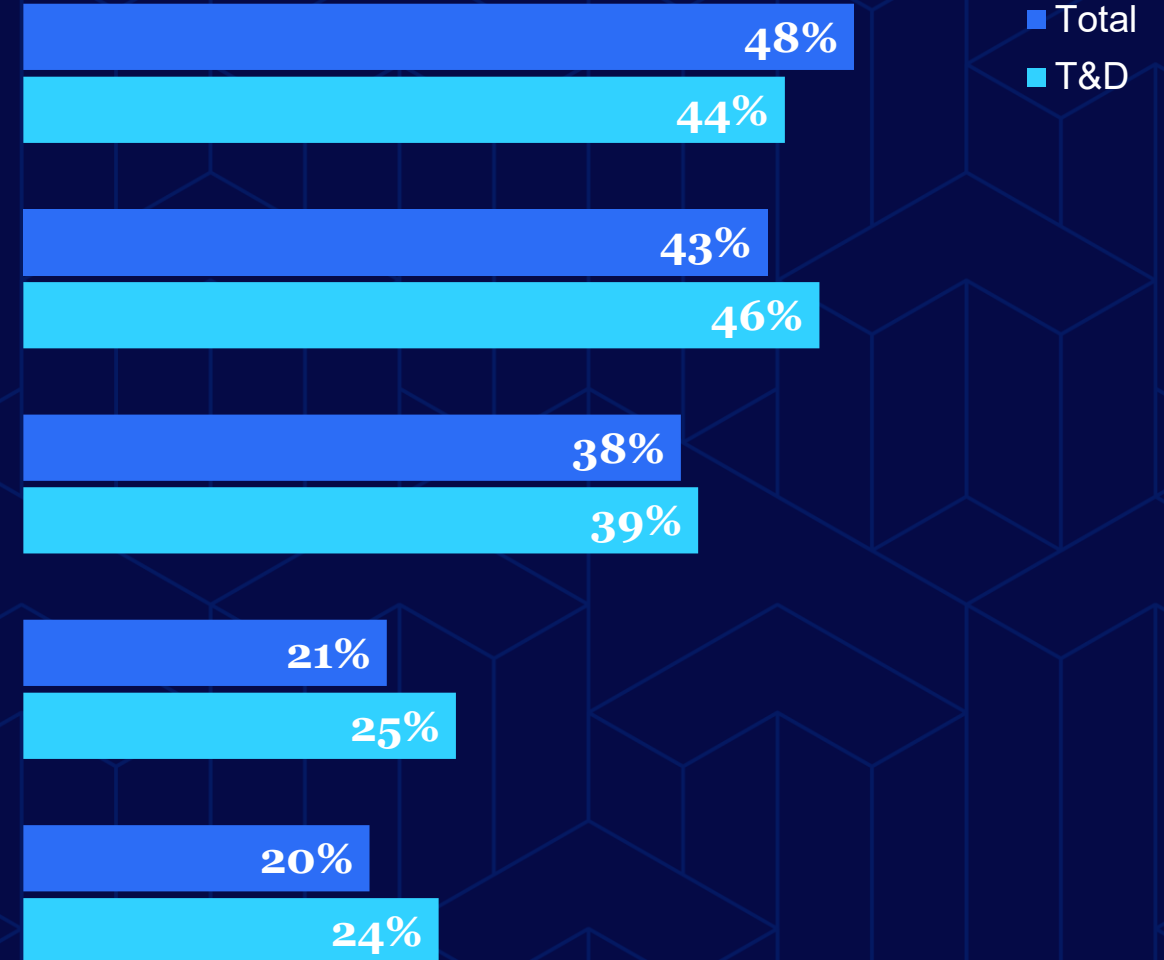
To **save money** (e.g., AI can help me find the best pricing, promo codes)

To **save the amount of time and/or effort** I spend on shopping & purchasing

To be able to make better shopping decisions (e.g., AI can look at and compare a lot more options than I do)

To make shopping more accessible (e.g., using text-to-speech to help with visual impairment, using translation to help with language barrier)

To have fun using the AI tool / agent



While price is still a key reason to leverage AI when shopping, consumers will also use AI to compare brands, models and features for tech products

Vacuum Cleaners	Dishwasher	TV	Mobile phones	Laptops
<i>Price</i>	<i>Brand</i>	<i>Brand</i>	<i>Model</i>	<i>Model</i>
<i>Brand</i>	<i>Price</i>	<i>Model</i>	<i>Features</i>	<i>Price</i>
<i>Model</i>	<i>Model</i>	<i>Price</i>	<i>Price</i>	<i>Features</i>



Consumers would consider AI-recommended brands, with price/ratings potentially influencing switch

Total

63% ▼

would consider AI-recommended brands but make their own decision

Top Criteria to Switch to AI-Recommended Brands

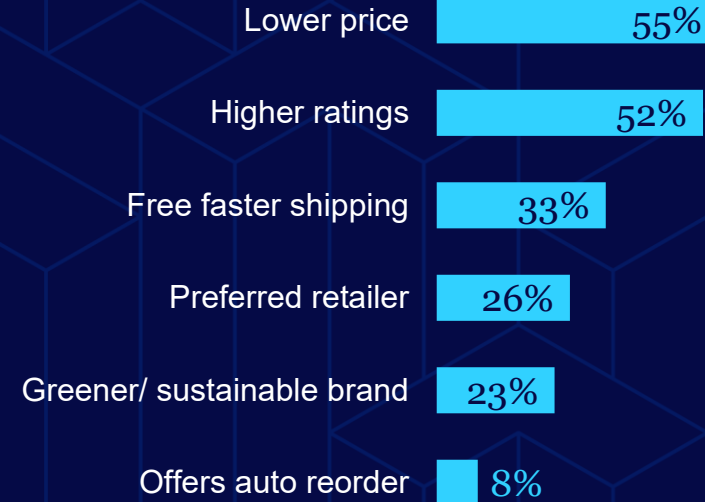


T&D

62%

would consider AI-recommended brands but make their own decision

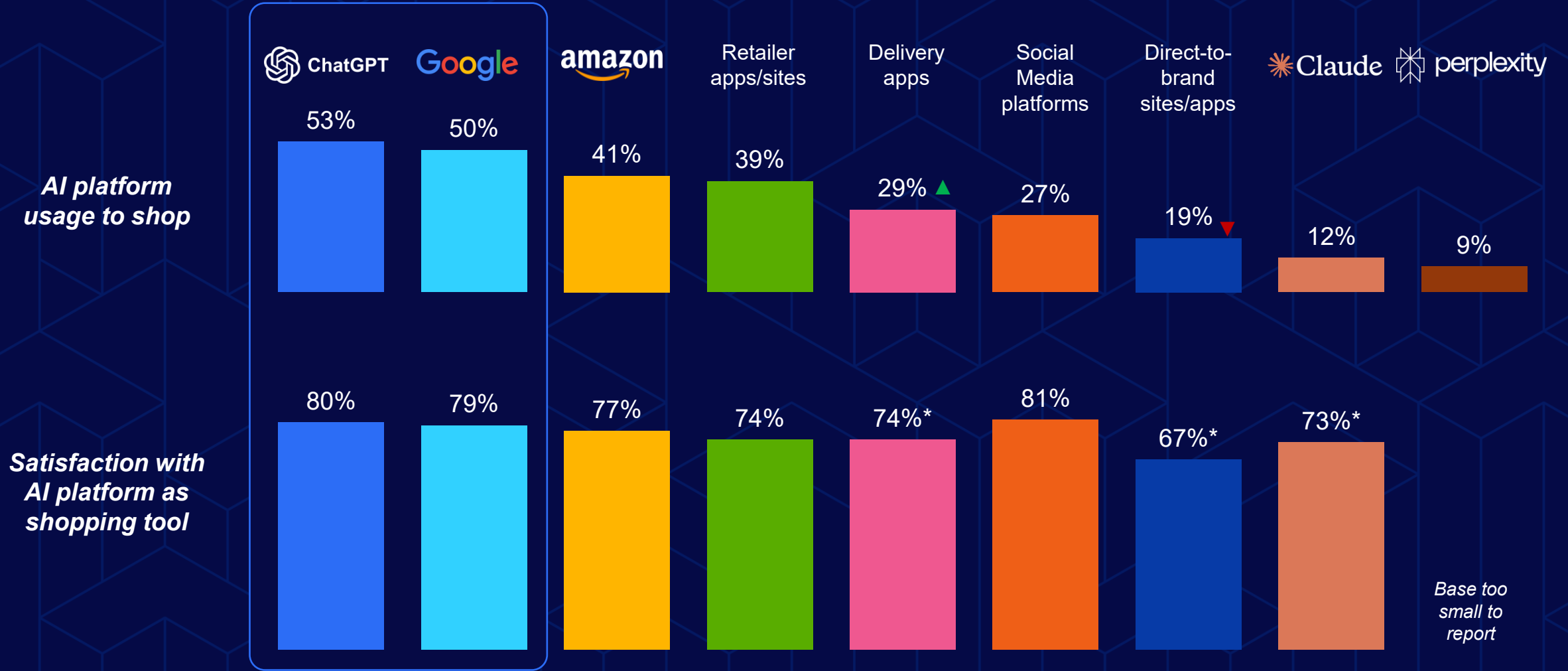
Top Criteria to Switch to AI-Recommended Brands



▲ / ▼ indicates significantly higher / lower than July 2026 wave at 95% confidence level



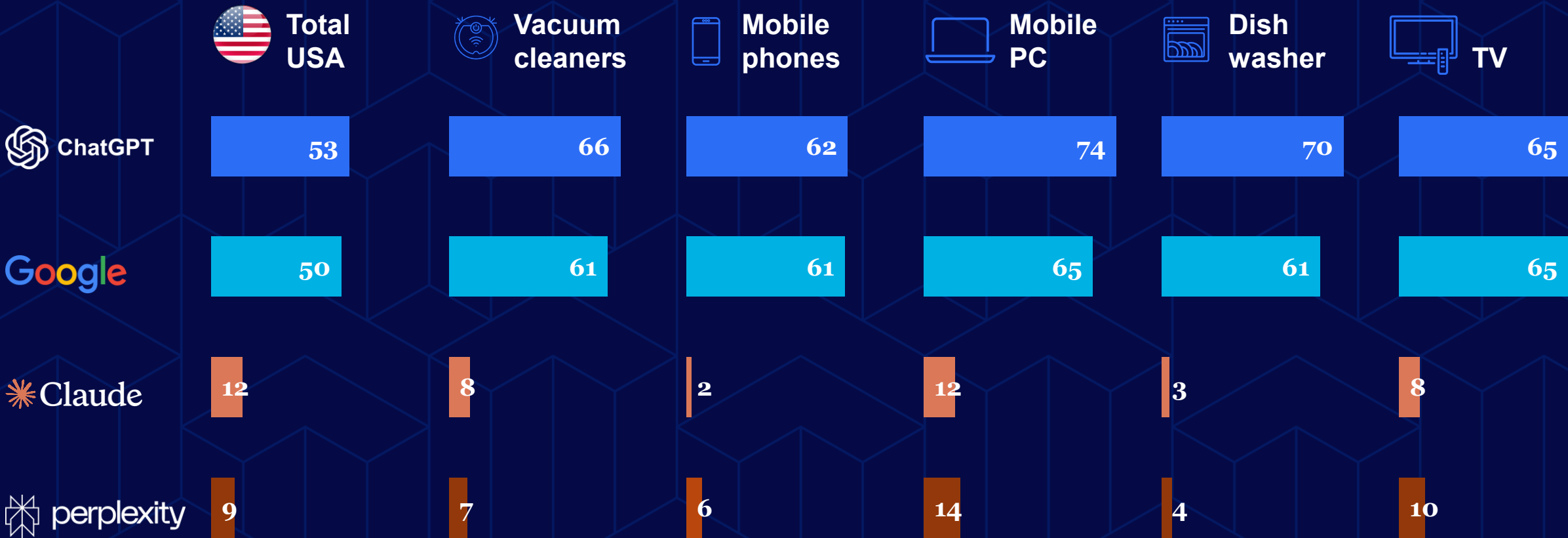
ChatGPT leads in usage to shop and satisfaction



*Small base size (between 30 and 59); interpret results with caution

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While ChatGPT is more likely to be used for Mobile PC and Dishwasher shopping than Google/Gemini, the two platforms are used about equally for Vacuums, Smartphones and TVs

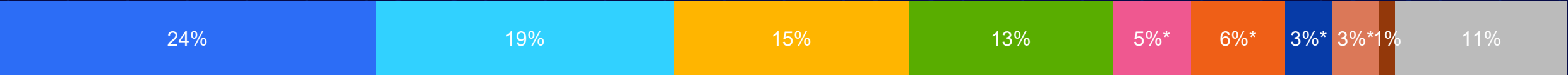




T&D Shoppers trust ChaptGPT more than the total USA, trust AI Shopping platforms in general more than the total USA

% Trust the most among all AI users

Total



T&D



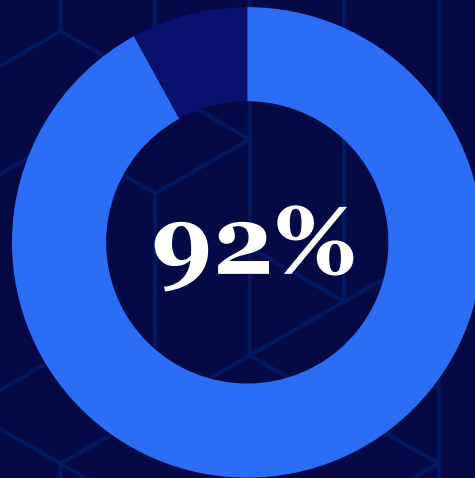
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Almost all consumers are comfortable sharing personal data with AI

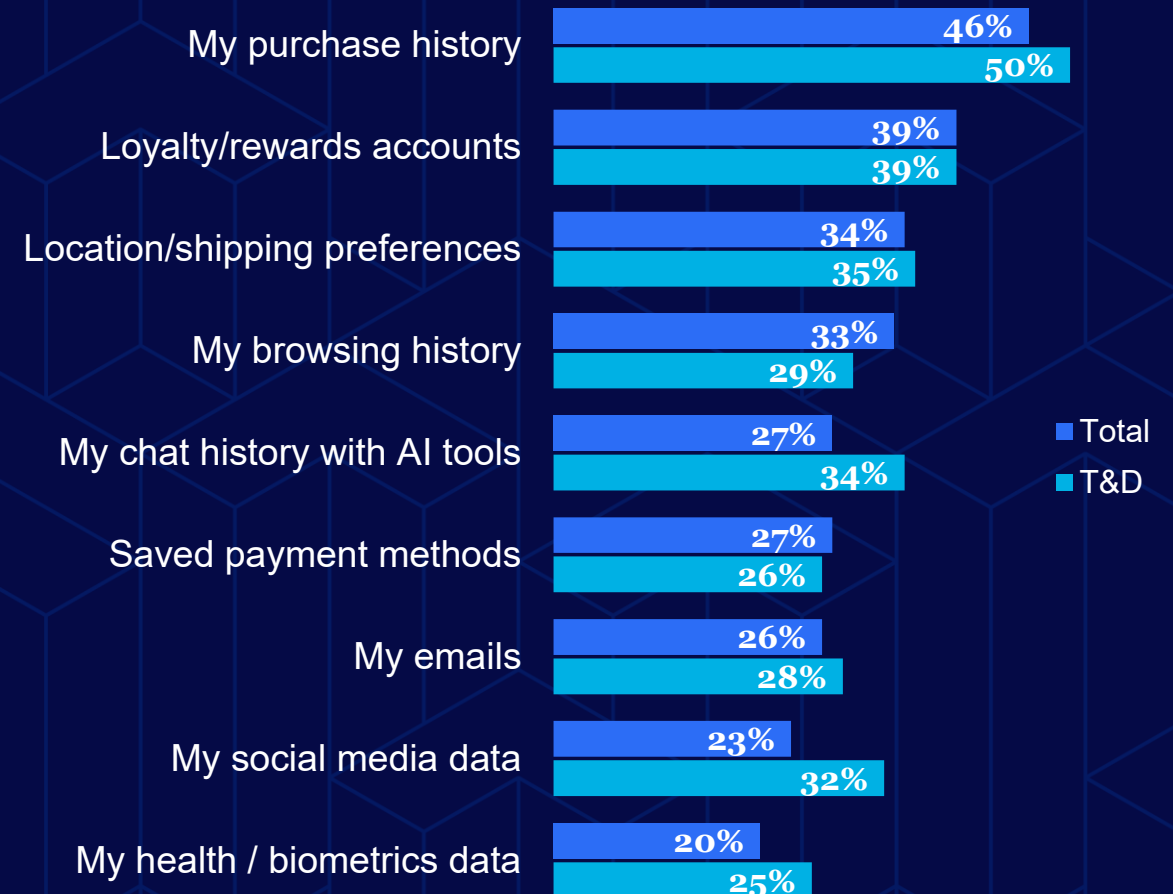
They most readily share purchase-related data while becoming more reticent with their browsing history



are **comfortable** sharing some personal data with AI tools / agents

among those who have used or considered using AI for shopping in P30D

Level of Comfort with Data Sharing





What Does This Mean?

From shelf to chat: AI is the new aisle

Agentic commerce, LLM advertising, and democratized AI tools are tilting the playing field toward challengers — and rewriting how shoppers discover, evaluate, and buy

What LLMs reward now:



Structured product data

Clean attributes, ingredients, claims — machine-readable, not just brand-poetic.



Authentic explanatory reviews

Reddit, Substack, creator comments — "why" beats star ratings.



Need-state language

"Best X for Y," "alternative to Z" — content that answers the agent's question.



Cultural & social signal

TikTok and YouTube traction now feeds nearly half of agentic results.

\$25B

LLM advertising opportunity — a layer where contextual relevance, not budget, decides placement (for now).

10–20%

of CA e-commerce spend may flow through agentic shoppers by 2030 — recasting RMN traffic and conversion economics.

Sources: NIQ × Kearney, The New Growth Frontier (Mar 2026); NIQ Innovation Vitality Meta-Analysis 2026; NIQ Consumer Outlook 2026.



Charting the Path Forward

America is split on AI.

The pros outweigh the cons, but enthusiasm lags other countries. Dig deeper to learn drivers and barriers for meaningful AI adoption; craft relevant strategies to engage enthusiasts and win over skeptics.

AI shopping has hit critical mass, driven by value.

Ensure complete, consistent data across all channels to improve the consumer experience. Maintaining consumer confidence will require quality model reviews and continuous improvement.

Marketers must operate like data companies, not marketers.

Winning in agent-mediated shopping means fixing product data everywhere, treating retailer PDPs as a strategic asset, guiding better reviews, & publishing comparison-ready content — an organizational shift, not just a content refresh.

Charting the Path Forward

Questions?

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Thank you for attending...

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