

## CUSTOMER INSIGHTS

# Consumers Trust AI to Buy Better. Brands Need to Move Quickly.

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Consumers around the world are buying into GenAI: they are using it more and more, and, in particular, they are using it to inform how they shop for products and services. Shopping-related GenAI use grew by 35% from February 2025 to November 2025.

We've surveyed consumers around the world to see how GenAI informs purchase pathways. (See "Methodology.") This use is rising, and consumers told us they view GenAI as a particularly valuable, and sometimes uniquely helpful, source of information as they shop. One respondent explained:

“It’s like having an open conversation with an expert. I can ask anything and get the most accurate information, and it saves me the time of doing research, as it does it for me.”

Companies need to recognize GenAI’s growing popularity—and power—as a shopping tool. Our research shows not only that shopping-related GenAI use is on the rise but also that it spans categories, making it relevant for all brands and retailers—which must prepare to optimize this new touchpoint with consumers.

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## — Methodology

This publication draws on two complementary sources of consumer insight: BCG’s longitudinal Global Consumer Radar series and AI-enhanced qualitative research.

**Global Consumer Radar.** Global Consumer Radar is BCG’s ongoing, longitudinal, survey-based series tracking consumer attitudes and behaviors across markets since 2020. For this publication, we leveraged findings from the September 2023 and October 2025 waves, each of which included more than 9,000 respondents from Brazil, China, France, Germany, India, Japan, Mexico, the UK, and the US. These countries represent approximately 48% of the global population. Samples in each wave were balanced demographically across age, income, gender, region, and ethnicity (where relevant).

**AI-Enhanced Qualitative Research.** We also conducted AI-enabled qualitative research employing video-based surveys with 303 US consumers who had recently used GenAI in a purchase journey, along with 64 additional GenAI users. Participants submitted short video responses to structured, open-ended prompts. The resulting transcripts were processed using advanced AI analytic techniques to identify recurring themes, classify response patterns, and surface emerging behavioral constructs at a scale not feasible with traditional qualitative methods.

# The Great Leap Forward in GenAI Awareness

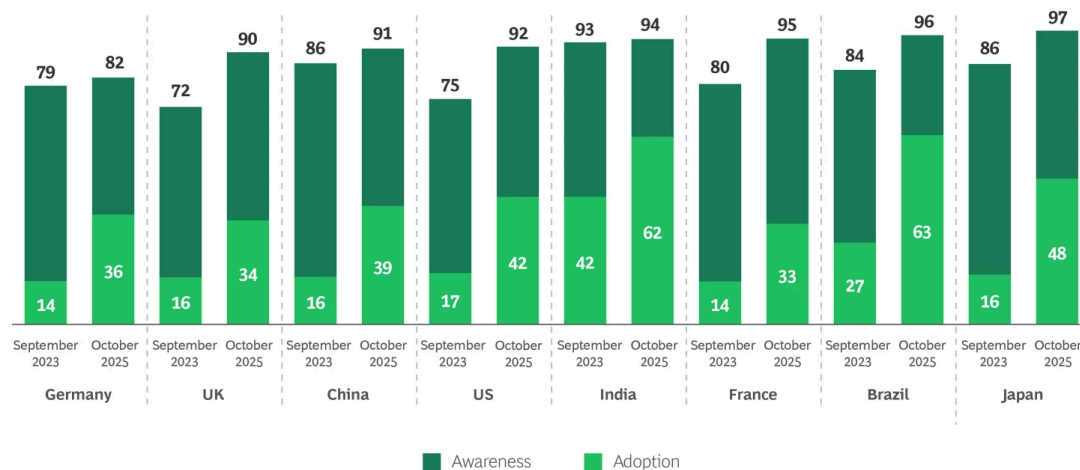
Underpinning GenAI's growing role in the purchase pathway is the rise in GenAI awareness and use in general.

We found that awareness of GenAI tools is now nearly ubiquitous. (See Exhibit 1.) Since BCG's Center for Customer Insight first monitored consumers' GenAI uptake on a global scale, more than two years ago, the percentage of consumers around the world who say that they are aware of GenAI tools and—even more telling—have used them has increased by 12 percentage points and 25 percentage points, respectively.

## EXHIBIT 1

### Awareness and Adoption of GenAI Tools Are Nearly Ubiquitous

% of respondents who are aware of or have already used GenAI tools



Sources: BCG CCI Global Consumer Radar surveys, September 2023, October 2025.

Note: Respondents were asked about their awareness and use of GenAI tools (e.g., ChatGPT, Microsoft Copilot, Google Gemini); n = 1,000–1,047.

AI chatbots have garnered users at breakneck speed. It took Facebook more than four years to reach 100 million users. It took Instagram two and half years. It took ChatGPT just two months. As a result, in some countries, half of all consumers are GenAI users.

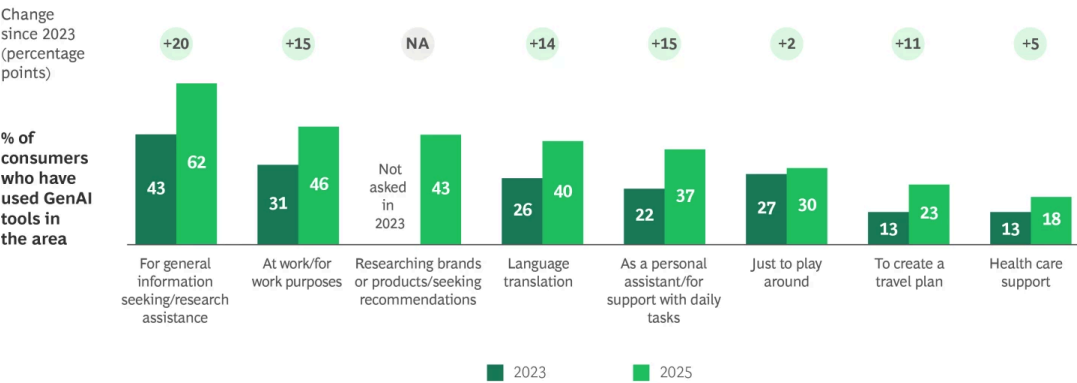
And once they become GenAI users, they remain AI users. According to our survey, 66% use the tech at least weekly. For many, it's become part of their everyday routine.

Consumers turn to GenAI for a variety of purposes. It's a widely acknowledged workplace tool. It's a sort of personal assistant, helping users to research topics, organize activities, and more. Now, it's a key facilitator of the purchase pathway. Shopping-related usage—research into and

recommendations for brands, products, and services—has become the third most popular application of GenAI among the uses we tested. (See Exhibit 2.)

EXHIBIT 2

Consumers Increasingly Use GenAI As Part of Everyday Behaviors



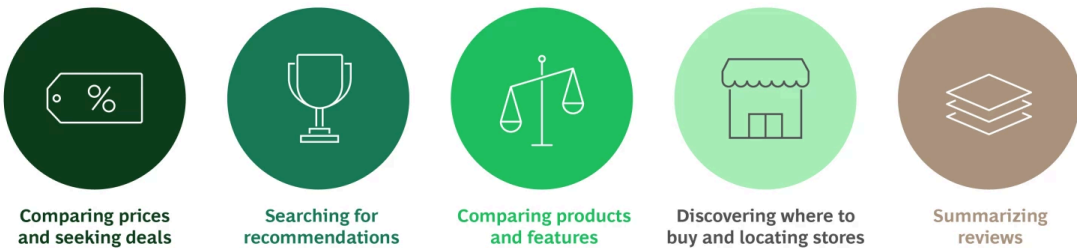
Sources: BCG CCI Global Consumer Radar surveys, September 2023, October 2025.  
Note: Data shown are for respondents in the US, UK, Germany, France, Japan, China, India, Brazil, and Mexico. Respondents were asked, “How have you personally used GenAI tools (e.g., ChatGPT, Microsoft Copilot, Google Gemini)?”; n = 4,151–4,278; NA = not available. Numbers reflect rounding.

# The GenAI-Enhanced Purchase Pathway Today

Shoppers turn to GenAI for myriad purposes along the purchase pathway. Exhibit 3 shows the most common use cases.

EXHIBIT 3

How GenAI Plays a Role Along Purchase Pathways



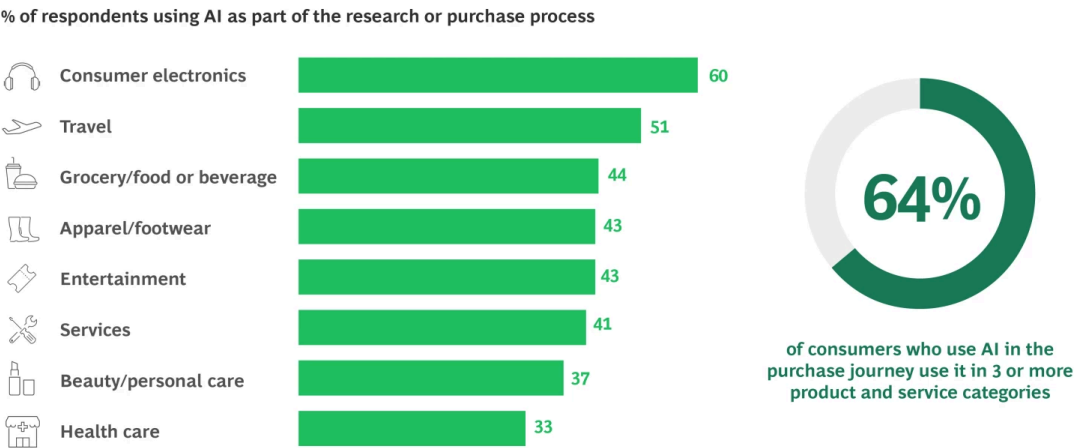
Source: BCG CCI GenAI Consumer Usage survey, November 2025.  
Note: Based on large-scale qualitative research analyzed using AI to identify themes and insights; n = 367.

But the list of specific uses is long and varied, as these examples shared by surveyed consumers demonstrate:

- “I used AI to look up the best **skin care routines** and then the best **products**.”
- “When making my recent **purchase of a cell phone**, I used AI to compare cell phone brands. I wanted to know the pros and cons for an iPhone compared with a Samsung phone. And I wanted to compare prices, such as whether I got it at UScellular versus Best Buy.”
- “I asked questions. What are the **healthiest types of olive oil**? How do you determine if it is good quality or bad quality? And which brands offer good quality for a reasonable price? It also helped me compare prices and features from different stores.”
- “I used AI to see if I could have my **coffee maker repaired**. And then, I looked up what other options for coffee makers were out there and the best models for my price, and it gave me some ideas.”
- “I used AI as I was **planning a trip** to London and Paris and looking for locations to get a rental place. I was particularly interested in good transit availability and interesting restaurants that you could walk to from the location. Just to get a better feel for the area before making a choice and committing to a rental.”

Shoppers use GenAI across categories. It’s not reserved for special, big-ticket items, such as consumer electronics; it’s also deployed to find information and deals related to routine, everyday purchases, like groceries. (See Exhibit 4.)

EXHIBIT 4  
AI Is Used Nearly Everywhere, from Electronics to Everyday Essentials



Source: BCG CCI GenAI Consumer Usage survey, November 2025.  
Note: Respondents were asked, “In which categories have you used AI as part of the research or purchase process?”; based on large-scale qualitative research analyzed using AI to identify themes and insights; n = 367.



While it's not surprising to see phones, laptops, flights, and hotels on the list of items that consumers explore with GenAI, the breadth of applications is eye-opening, proving the wide relevance of GenAI for brands and retailers. (See Exhibit 5.)

## Shoppers Use GenAI for Big Purchases and for Niche Needs



Of course, not all shoppers are turning to AI for guidance—yet. Some prefer to retain their autonomy. Some don't trust that GenAI is reliable.

# Why GenAI Resonates with Shoppers

Brands and retailers reach consumers through many established touchpoints: search engines, brand websites, in-store displays, and social media, to name a few.

GenAI is both a part of this mix and a source of new touchpoints, such as conversational AI experiences and answer-first interactions that sit alongside traditional ones. In many cases, AI use fits seamlessly into this web of touchpoints, becoming a helpful companion in the shopper's journey. One consumer, for example, described seeing an in-store clearance deal that seemed too good to be true and turning to Siri connected to ChatGPT to check prices, verify whether the offer was legitimate, and read reviews before deciding to purchase.

As emerging touchpoints complement traditional ones, they add to the broader proliferation of interactions that shape today's nonlinear shopping journeys. This makes it essential for marketers to be deliberate about which touchpoints they emphasize at different stages of the journey.

Despite its current lower reach relative to other touchpoints, GenAI tends to be highly influential and often decisive. Consumers trust GenAI. According to our survey, more than 60% of consumers express high trust in GenAI results. Further, other recent BCG research found that GenAI assistants and chat tools ranked as the second most influential touchpoint among consumers who used them in their purchase journey. And among daily GenAI users, these tools rose to the top spot as the most influential touchpoint overall. What is it that GenAI does so well? Consumers we surveyed offered insights into GenAI's unique value:

- **It gives direct answers without clutter.** Shoppers don't need to click through ads or sift through reviews. "It takes out all the guesswork of scrolling through ads and opinions and gives you the direct answer," a respondent told us.
- **It feels more objective and transparent than ads, influencer content, or sponsored results.** "It felt like they gave a true, unbiased opinion on the pros and cons when comparing two different brands or models," we heard.
- **It feels like a conversation—natural, explanatory, and responsive.** AI allows follow-up questions and adjusts, like a knowledgeable guide. When discussing their experiences with GenAI, consumers frequently said things like "it talks to you," "it spoke to me," and "a free-flowing conversation."
- **It's personalized.** GenAI tailors its answers to users' needs, context, and routines. "It told me which smartwatch to get based on how I work out," said one respondent. "The thing talks to you like it knows you—based on past conversations and stuff," said another.

- **It helps users figure out what they want.** AI can help shoppers not just by answering questions but by framing questions. As one respondent put it, “AI helps me explore my own mindset and figure out what I want exactly, because sometimes I’m not even sure.”
- **It creates confidence in purchase decisions.** Consumers appreciate the convenience and time saving benefits of GenAI, but the clearest and most frequently cited upside is the confidence GenAI instills in final purchase decisions. Said one consumer, “It’s like I’m speaking with the smartest person in the room.”

A feeling of confidence is especially useful when consumers are comparing similar products (checking which tech devices are compatible with existing software, for example), navigating complex tradeoffs (balancing price versus features for, say, a tablet given how the consumer would use it), or seeking the best deal (one example would be finding which bank would offer the best bonus for opening an account). All in all, consumers’ use of shopping-related GenAI is not just about efficiency. Rather, it’s a way to get better results and greater confidence in decisions.

Why else do consumers gravitate toward GenAI? It’s the technology’s ability to meet broad consumer goals. For example, it can help consumers manage their health, improve their appearance, or plan an experience. In the course of these interactions with GenAI, consumers often make purchases that support their overall task or intent, even when they didn’t initially or explicitly seek to research and buy a specific item or service. For example:

- A consumer who used GenAI to find out how to make a healthy taco was served up a list of ingredients as well as options for where and how to buy them.
- A person whose washing machine was malfunctioning described the issue to ChatGPT and got a diagnosis and directions to access a replacement part.
- Someone who was planning to redesign a bedroom sought ideas for colors and styles; alongside the design concepts came recommendations for stores and products.

GenAI’s ability to direct consumers to specific brands and retailers is an opportunity that some brands are embracing. (See “How Companies Are Embedding AI into Shopping and Service Experiences.”)

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## — How Companies Are Embedding AI into Shopping and Service Experiences

Recent BCG research on trends in year-end sales events shows that consumers are increasingly empowered through GenAI, making their deal hunting more



professionalized and data-driven. For retailers, addressing this development requires engaging customers early and continuously, achieving visibility within AI-driven shopping ecosystems, and ensuring clear and transparent communication while delivering promised discounts.

Here's how some brands are deploying AI to meet consumers where their needs take shape:

- Walmart partnered with ChatGPT for instant checkout, allowing users to discover and purchase without leaving the chat.
- Instacart's Ask Instacart builds grocery carts from meal ideas or recipes in seconds.
- Lowe's Mylow helps customers plan projects and select the right products.
- A leading global beauty brand built an AI agent, powered by LLMs, to deliver personalized answers to consumers and recommend specific products.

These innovations illustrate AI's shift into a more integrated role in the shopping experience, offering guidance, personalization, and reduced friction.

## How Businesses Can Use GenAI to Drive Demand and Choice

Brands and retailers have a big opportunity to capitalize on GenAI's influence on consumer purchase decisions. Not doing so risks losing out on visibility to consumers and thus surrendering a competitive edge. Businesses that take a cohesive and well-considered approach will be able to incorporate GenAI successfully and reap the benefits of showing up for consumers.

**Recognize AI as a meaningful touchpoint in its own right, as well as a connected part of a broader, multi-touchpoint customer purchase pathway.** GenAI "punches above its weight": its reach is still growing, but when consumers do use it, it is often influential. People turn to it for

comparison, clarification, and confidence. It acts as a guide to help them figure out what's best for them.

Because consumers rely on AI for a handful of jobs—clarifying options, comparing products, personalizing guidance—businesses should be narrow and deep.

That is, narrow your efforts to the few moments where AI directly shapes choices. Go deep on the few decision points that matter most in your category and for your brand, whether that means structuring content so that GenAI returns clear answers or building targeted tools that help customers make purchase decisions.

Remember that GenAI sits within a broader ecosystem. Consumers stitch together social, search, brand sites, influencers, and AI, often moving fluidly among many touchpoints. That means brands need to ensure:

- Consistency of facts and brand presentation across every touchpoint
- Completeness and cohesiveness so that sites and interactions help shoppers validate and compare what AI recommends
- Continuity so that the story holds together as people move from one touchpoint to another

Each step in the journey should be answer-centric, not just navigable. With that in mind, to your SEO efforts, add AEO (answer engine optimization) and GEO (generative engine optimization) to enhance AI's content delivery.

**Think the way consumers think.** Recognize not only the problem each consumer is trying to solve but also the context in which the problem exists, and ensure your brand shows up clearly in AI answers. De-average across products, customer needs, and journeys. Optimize for AI through approaches such as AEO and GEO, while considering the blend of touchpoints—including in-store, search, and AI—that are part of distinct consumer purchase pathways.

Make sure you can deliver across touchpoints. Start with your brand identity: ensure clarity in defining who you serve, your unique value proposition, and your right-to-win. Then, translate that into compact, answer-ready modules. Ensure that your product (or service) story can be returned as a clear, trustworthy answer: use, for example, plain-language explanations, side-by-side comparisons (particularly in categories where products and specs matter), and straightforward proof points that address the real questions consumers ask.

The large language models (LLMs) that inform GenAI pull brand info from a variety of sources: your site, social channels, third-party publications, and more. It's critical to build on-site content that is visible and aligns with the prompts consumers actually pose, to strengthen off-site content where people research, and to use integrations (such as product feeds, checkout, and an app store) so that AI systems can return accurate, relevant answers about your brand.

**Focus on AI's unique capabilities.** AI shines at personalizing to the needs of the consumer, building plans and routines (such as travel itineraries and skin care routines), and summarizing across sources. Create content and experiences that make those jobs easy to do with your brand—that is, guidance that adapts to needs, modular “how to choose” frameworks, and objective pros and cons.

**Measure helpfulness, not just clicks.** Track whether your brand is present—and preferred—when AI is used. This means monitoring how often your products (or services) appear in AI-generated answers to priority questions, the quality and accuracy of those answers, and how its influence compares with other touchpoints. Emerging analytics tools can track brand visibility across AI models, providing insight into how your brand is represented and where there are opportunities to improve.

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GenAI is rapidly becoming a mainstream and influential companion in consumers' purchase journeys, offering clarity, personalization, and confidence in ways traditional touchpoints do not. As adoption grows across categories from everyday groceries to sophisticated electronics, GenAI's ability to guide decisions will increasingly shape how consumers compare options, validate information, and choose brands. This shift raises the stakes for companies, which must ensure that their product narratives, facts, and value propositions are clearly differentiated, consistent, and optimized for AI-driven environments. The businesses that adapt most quickly will secure visibility and preference in the increasingly frequent moments when GenAI meaningfully influences demand and choice.

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