



RETAIL TECH REPORT: AGENTIC EDITION



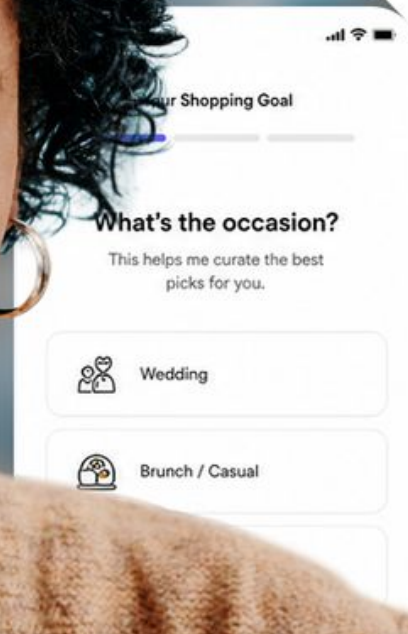
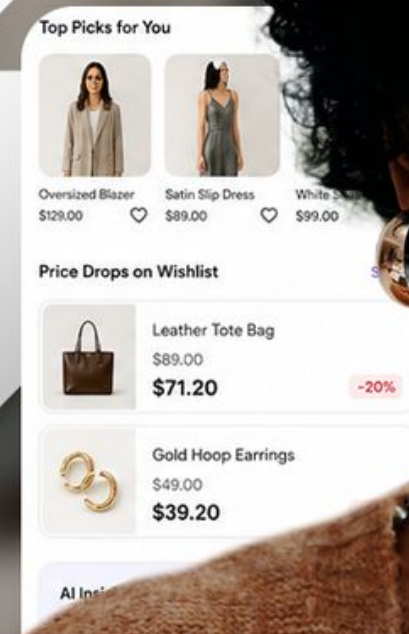
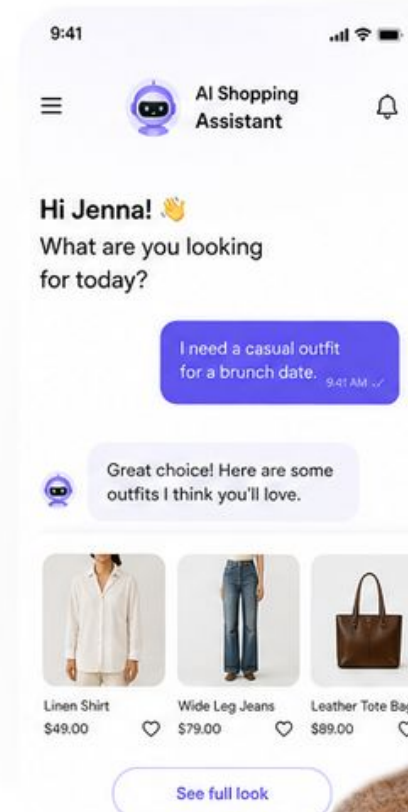
Based on a survey of 1011 diverse US consumers

(proportionately representative of the population), we explore how consumers are adjusting their shopping habits thanks to the prevalence of AI, increased price sensitivity, and more seamless social commerce experiences.

*%s may not add up to 100 within the report due to rounding

Melissa Minkow

Global Director, Retail Strategy & Insights



SUMMARY



CONTEXT	ALL ABOUT AGENTIC	CHANNEL NUANCE
03	14	30
LOYALTY	TAKEAWAYS	APPENDIX
38	43	44



CONTEXT

2026

RETAIL TECH REPORT: AGENTIC EDITION

CONTEXT

US



THE PATH TO PURCHASE IS EXPANDING

Following up on the compelling, AI-forward consumer shopping behaviors revealed by our Retail Tech Reality Check report, this research takes a deep dive into how the modern path to purchase is evolving.

The report covers agentic commerce adoption and how retailers can foster loyalty in such fast-changing times.



Key Terms Defined: “AI Agent” “Shopping”

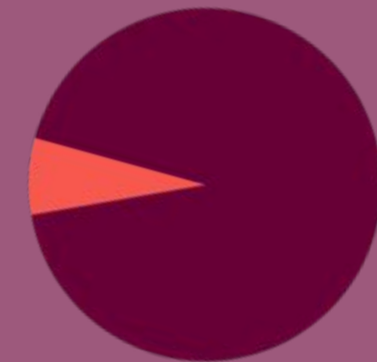
In this survey, we are defining an “AI agent” as a digital assistant that can recommend products for you and can also take actions for you, like narrowing down options, checking on prices and delivery timelines, adding items to a cart, reordering products, or completing a purchase within rules you set.

Additionally, we are defining “shopping” as any part of the path to purchase, which includes researching a problem you need to solve by buying something, browsing for items you may buy, putting an item in your cart, and purchasing an item.

Most consumers feel they are making smarter purchase decisions, choosing better value and becoming more informed before buying.

I feel I am making smarter purchase decisions than I did two years ago.

7%
FALSE



93%
TRUE

Please select the term that best describes what it would mean to make smarter purchase decisions.

36%

More consistently choosing retailers/ brands that I have researched and/or know more about before buying

17%

More consistently choosing retailers/ brands that align with my values



19%

Less expensive

29%

Better value- more expensive, but last longer/better quality

Participants mostly attributed their ability to **make smarter purchase decisions** to being less impulsive/ more researched with their purchases

More informed, slower decisions

More experience

Slower on purchase decisions

More information available

AI and technology

Rising costs

Looking for better deals

Value-seeking

"I've learned how to gauge what kind of quality things are and have really been saving money from having to replace things of lesser quality so often" – Female, 28-34

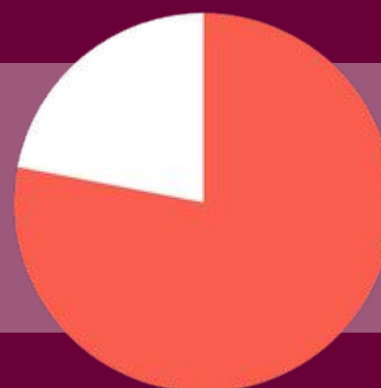
"I'm using AI to compare prices and find the lowest" – Male, 18-27

"There are more options available for searching and comparing product prices" – Female, 44-59

Most consumers feel they are smarter shoppers because of AI, and it's making them shop more.

Thanks to AI, I can be **smarter** about what I buy.

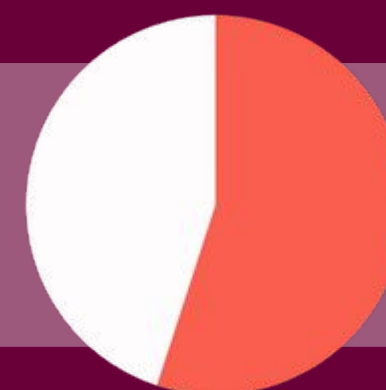
22%
FALSE



78%
TRUE

Because I can use AI to help me shop, I am **shopping more** than I was before I could use it.

45%
FALSE



55%
TRUE

Which of the following is **most frustrating** to you when shopping online?

- 1. Not being able to easily find what I'm looking for**
- 2. Not having helpful product descriptions**
- 3. Not being able to receive my items in a timely manner**

Having to pay for returning items

Not having useful product images

Not having helpful customer service

Having a lengthy returns process (e.g. requiring me to print labels and package the item up myself)

A lengthy payment process

Which of the following do you tend to find **more useful** when online shopping?

1. Detailed product descriptions

2. High quality product imagery

3. Ratings/reviews

Sizing chart/dimensions for you to use

Sizing and product recommendations based on previous orders

Virtual trial tools

Describe your ideal shopping experience in as much detail as possible.

Be as imaginative/creative as necessary– you can describe features that don't yet exist. Please include the type of product you're shopping for.

Needs are anticipated

Suggestions are tailored based on preferences, size, past purchases

Quick and easy

List synchronization

Options given that make sense

Everything is in stock

Notifications for deals or availability based on carts or lists

Certainty with sizing

"The shop scans my existing digital closet and shows me exactly how the new item pairs with what I already own. It generates 'Outfits per Dollar' metrics, showing me 15 different ways to wear the item with my current clothes, ensuring I never buy something that sits in the back of the closet." – Female, 28–34

"When shopping for a new book to read, it would be great to be able to describe exactly what I'm looking for (plot type, genre, character tropes, etc.) and have an AI agent provide me with books that contain those elements and a short description of each book (that doesn't just regurgitate the back cover text) and why it was recommended." – Male, 44–59

"Before leaving out have my AI List ready and once at the store it tell me about what other options I have. Can also tell me about upcoming sales to wait and come back for that item would be very good." – Male, 44–59

Which of the following statements best describes how you typically begin most online shopping journeys?

Consumers are starting their path to purchase with a good idea of what they want

Product + brand in mind, open to other brands

Some product idea, unsure about specs and brand

Product, specs, and brand in mind

Brand in mind, open to products offered

Product + specs in mind, no brand preference

Product + brand in mind, unsure about specs

I just start browsing and realize I need something

21%

17%

17%

15%

13%

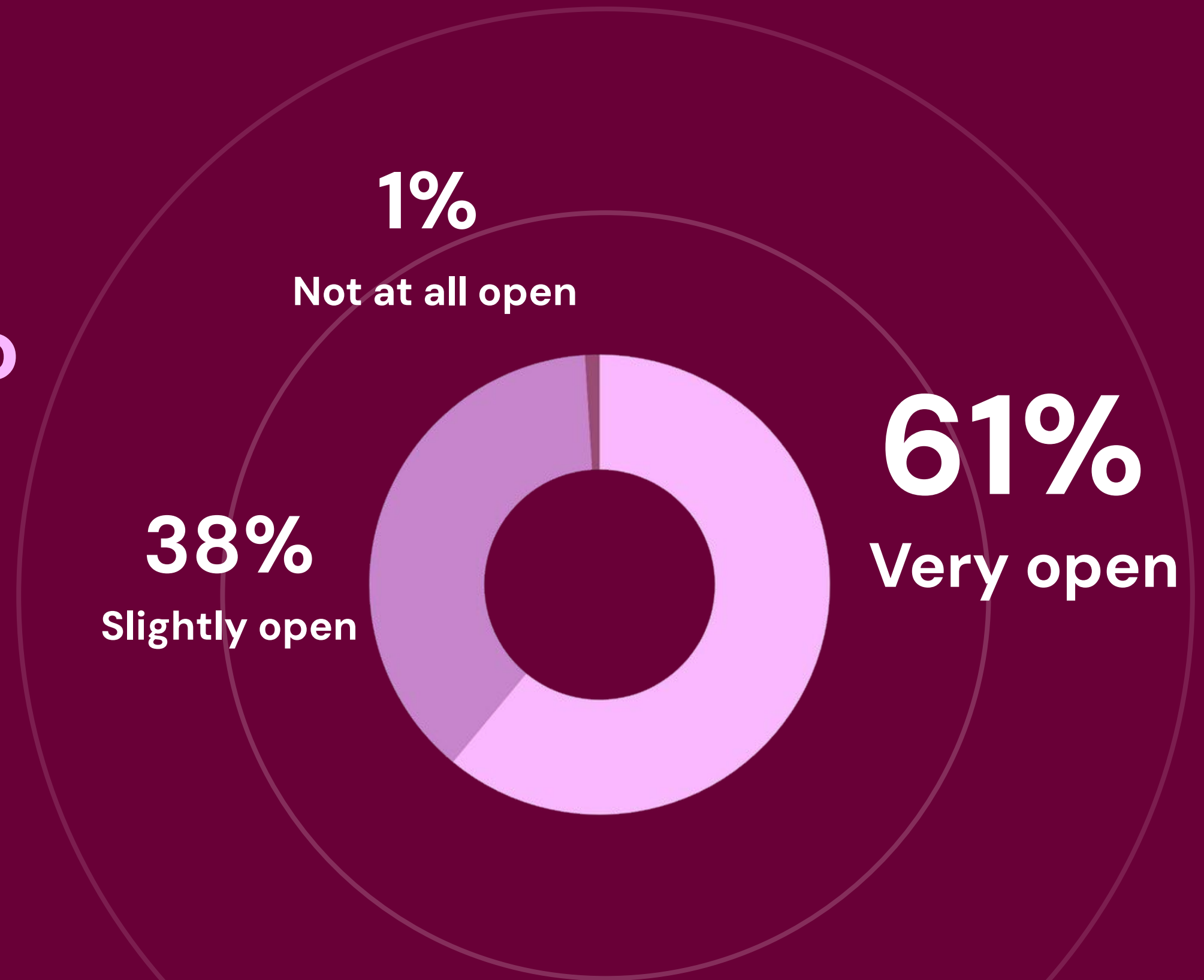
11%

7%

99%

of consumers are at least slightly open to discovering new brands.

How open would you say you typically are to discovering new brands?





ALL ABOUT AGENTIC

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ALL ABOUT AGENTIC

US

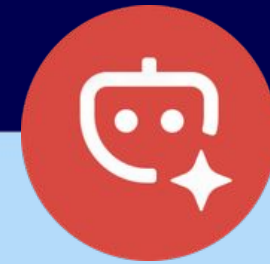
Have you ever used an AI agent such as ChatGPT, Google Gemini, Google AI Mode, Copilot or Perplexity to help you shop?

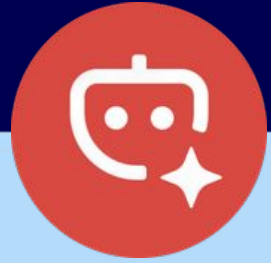
87%
have done so
in the last 3
months

74%
OF RESPONDENTS
HAVE USED AN AI
AGENT WHEN
SHOPPING

26%
HAVE NOT YET
USED AN AI AGENT
FOR SHOPPING

63%
are open
to it





90%

OF PARTICIPANTS
HAVE EITHER USED
AN AI AGENT FOR
SHOPPING OR ARE
OPEN TO DOING SO
IN THE FUTURE

10%

OF PARTICIPANTS
HAVE NOT USED AN AI
AGENT FOR SHOPPING
AND SAY THEY ARE
NOT OPEN TO IT

TRUST IS THE NUMBER ONE CONCERN

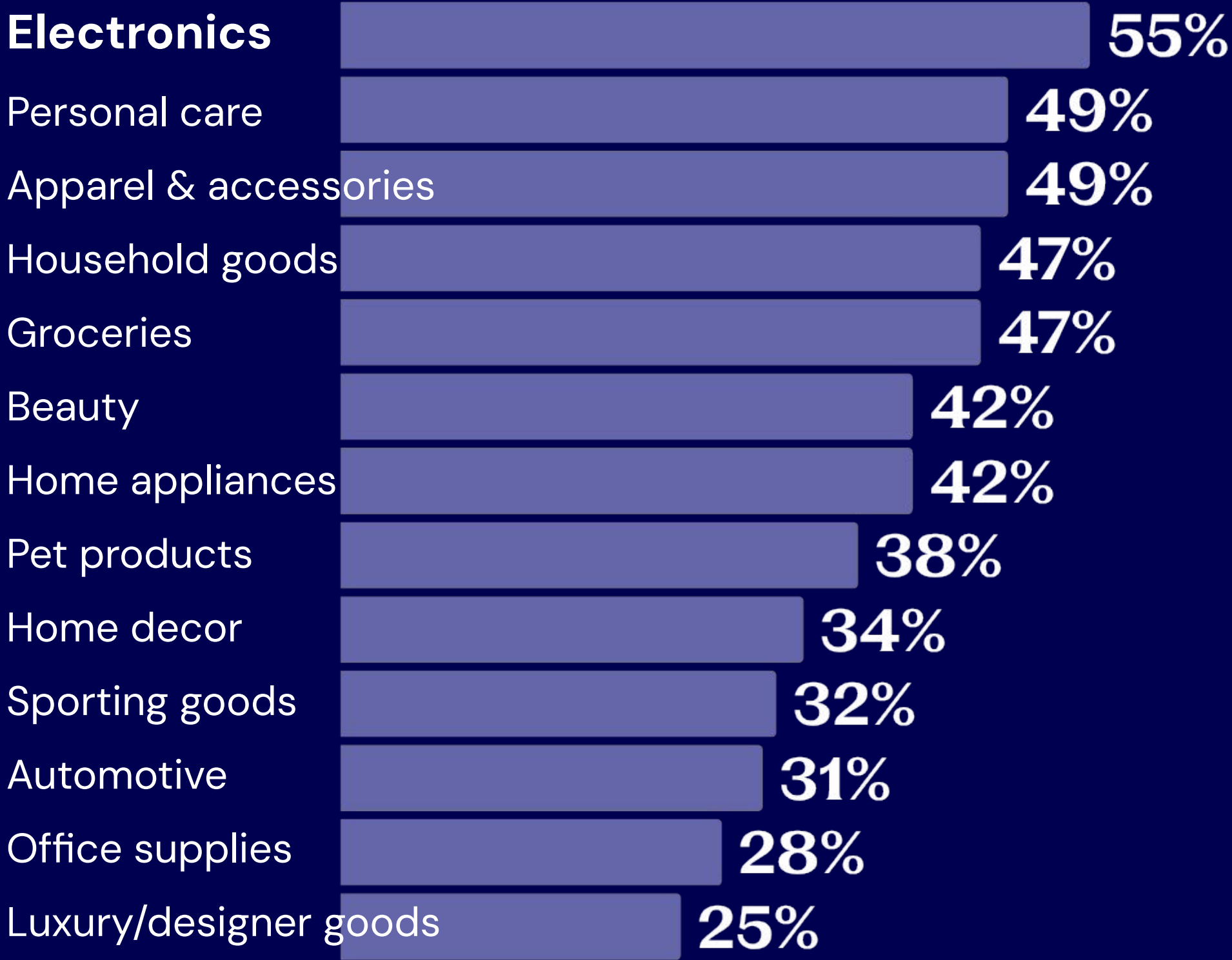
Resistant participants feel it's risky, dangerous and demonstrate fear and uncertainty.

SENSE OF CONTROL

Common phrases are "I prefer to make my own decisions," and there is an overall anti-AI sentiment among those not open.

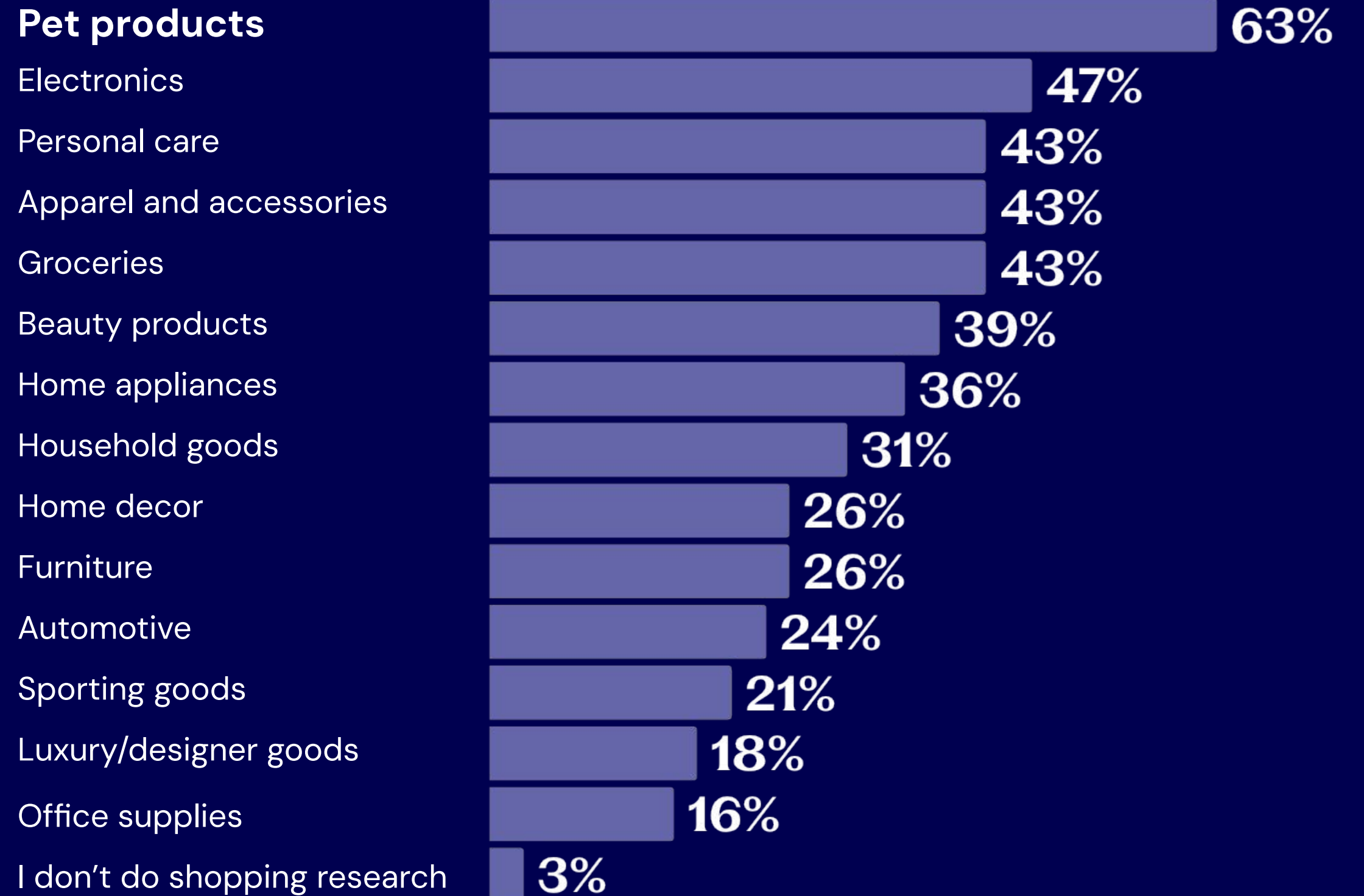
For which of the following categories would you use an AI agent to shop (either have already or would in the future)?

[Select all that apply]



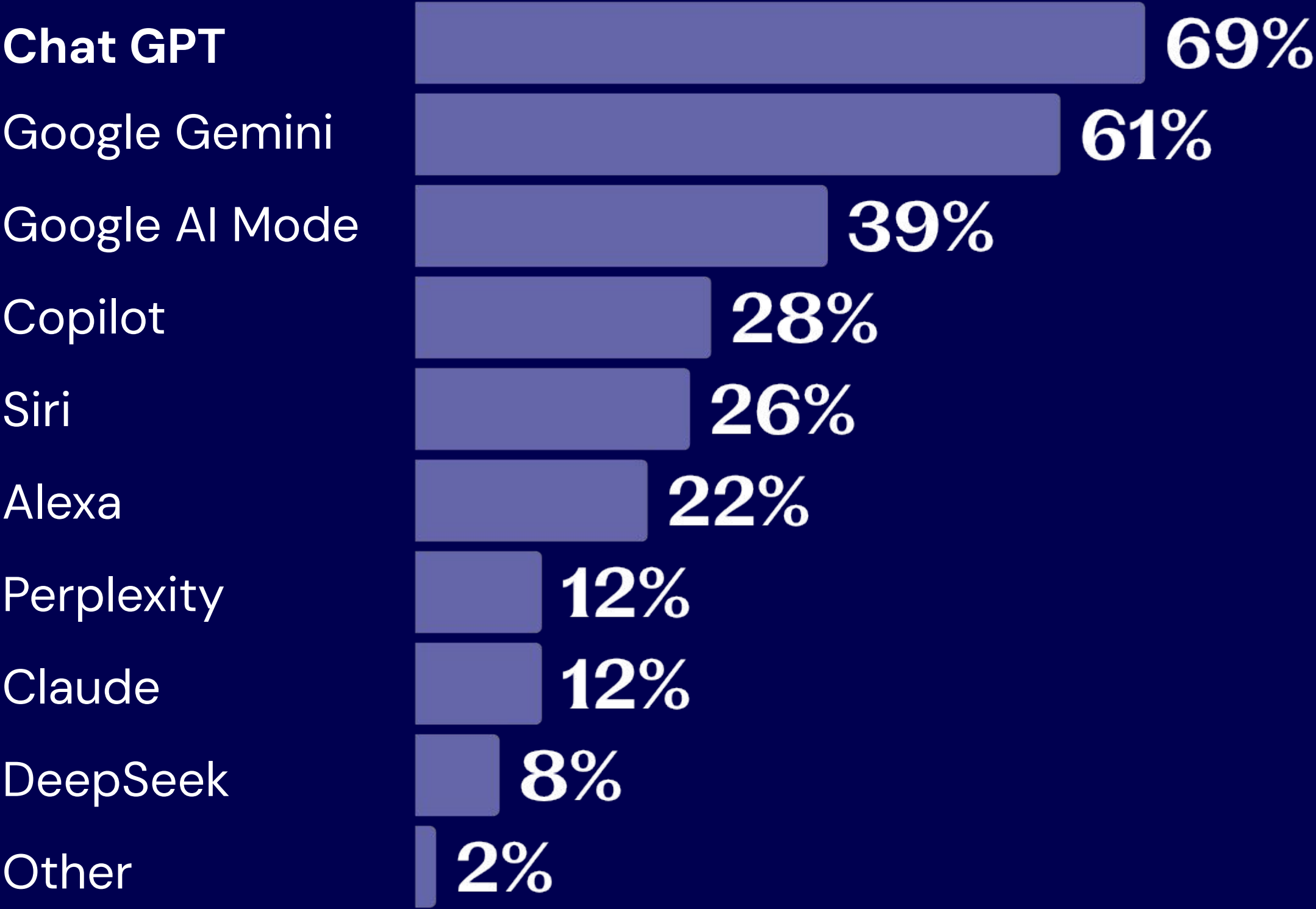
In which of the following categories do you often research brands/types of products/providers?

[Select all that apply]



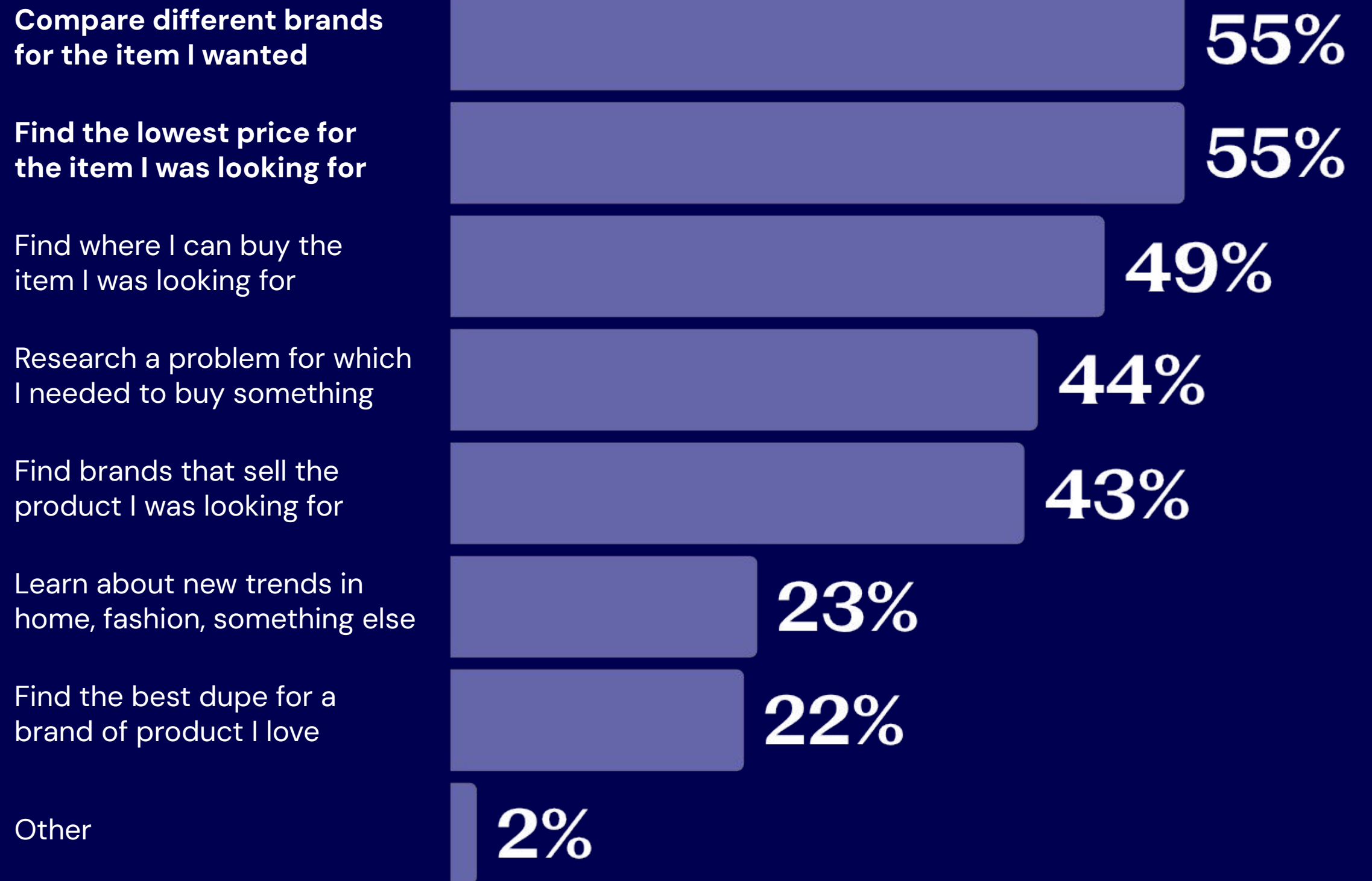
Which of the following agents did you use in the last 3 months?

[Select all that apply]



What did you/have you used an AI agent to do?

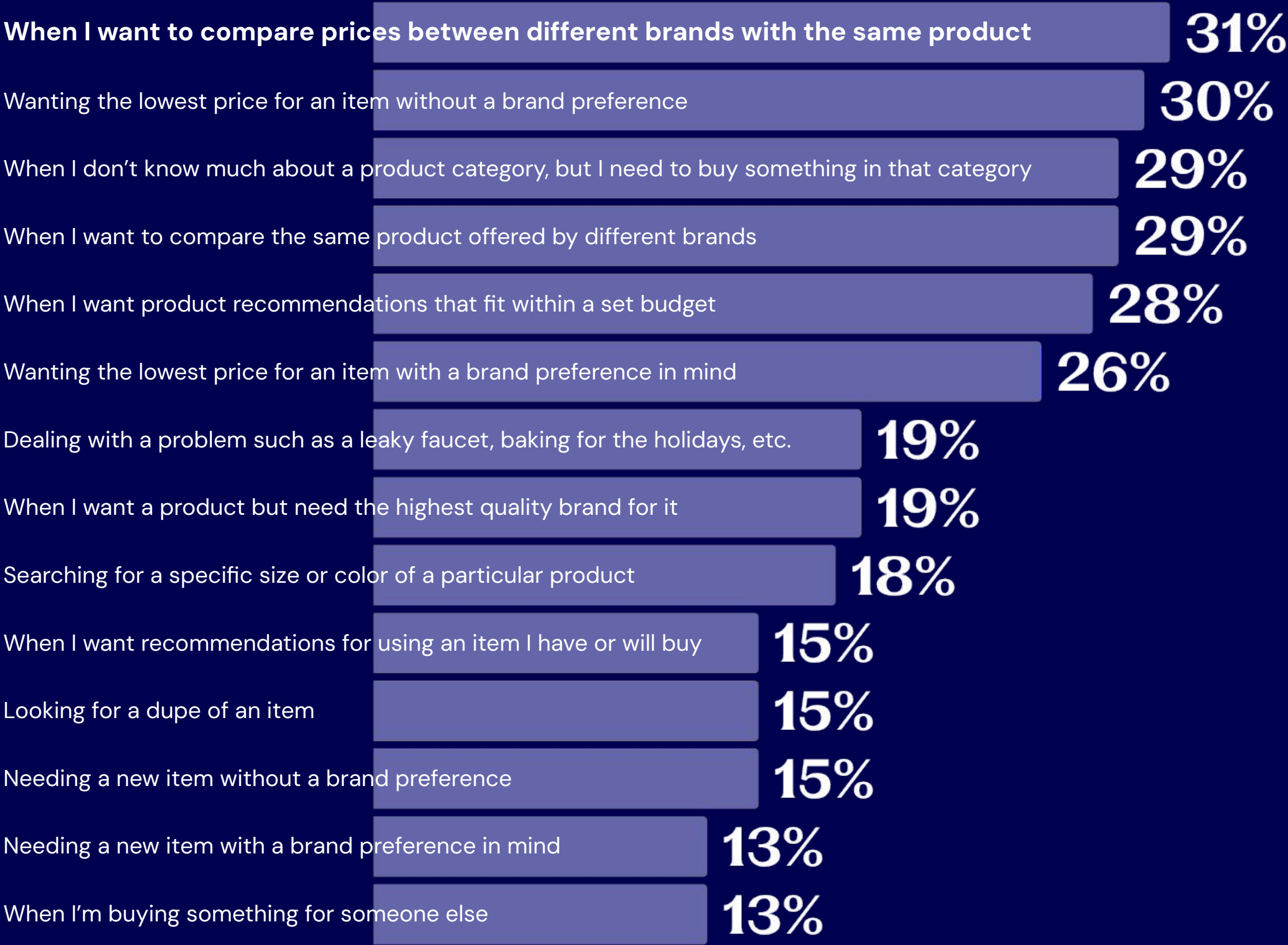
[Select all that apply]



In which scenarios do you or would you find AI agents to be most helpful?

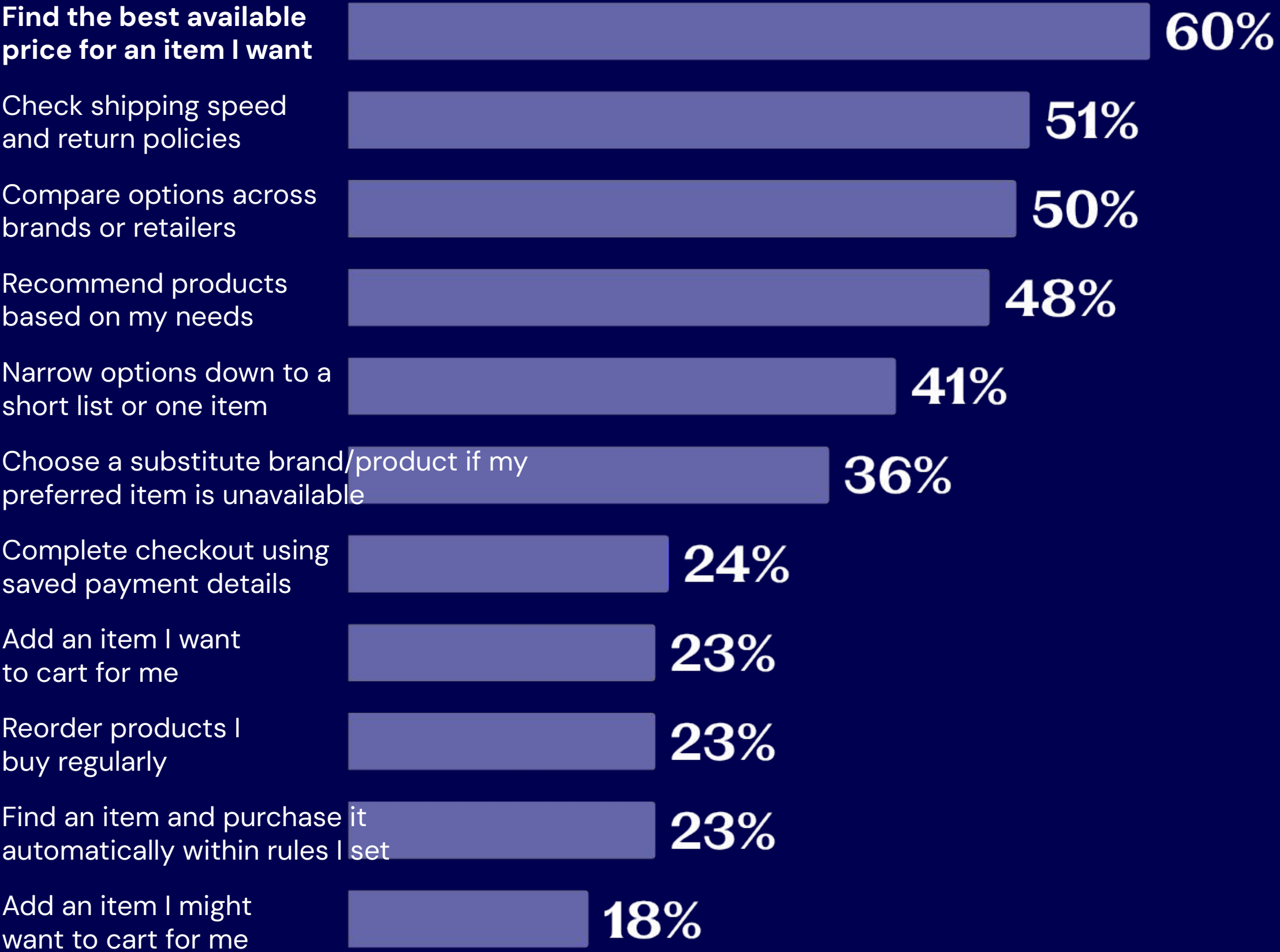
[Select 3]

Conducting comparisons and finding the lowest price are consumers' agentic priorities



Which of the following would you be comfortable allowing an AI agent to do for you?

[Select all that apply]



Agents drive convenience in modern ways: through low prices and mental energy reduction

Which of the following best characterizes where you would find the most value in using an AI agent for shopping?

Saves mental energy when researching a product to solve a problem

1

Saves me money when needing to buy something by finding the lowest price

Saves me time when looking for a particular product/ brand I want to buy

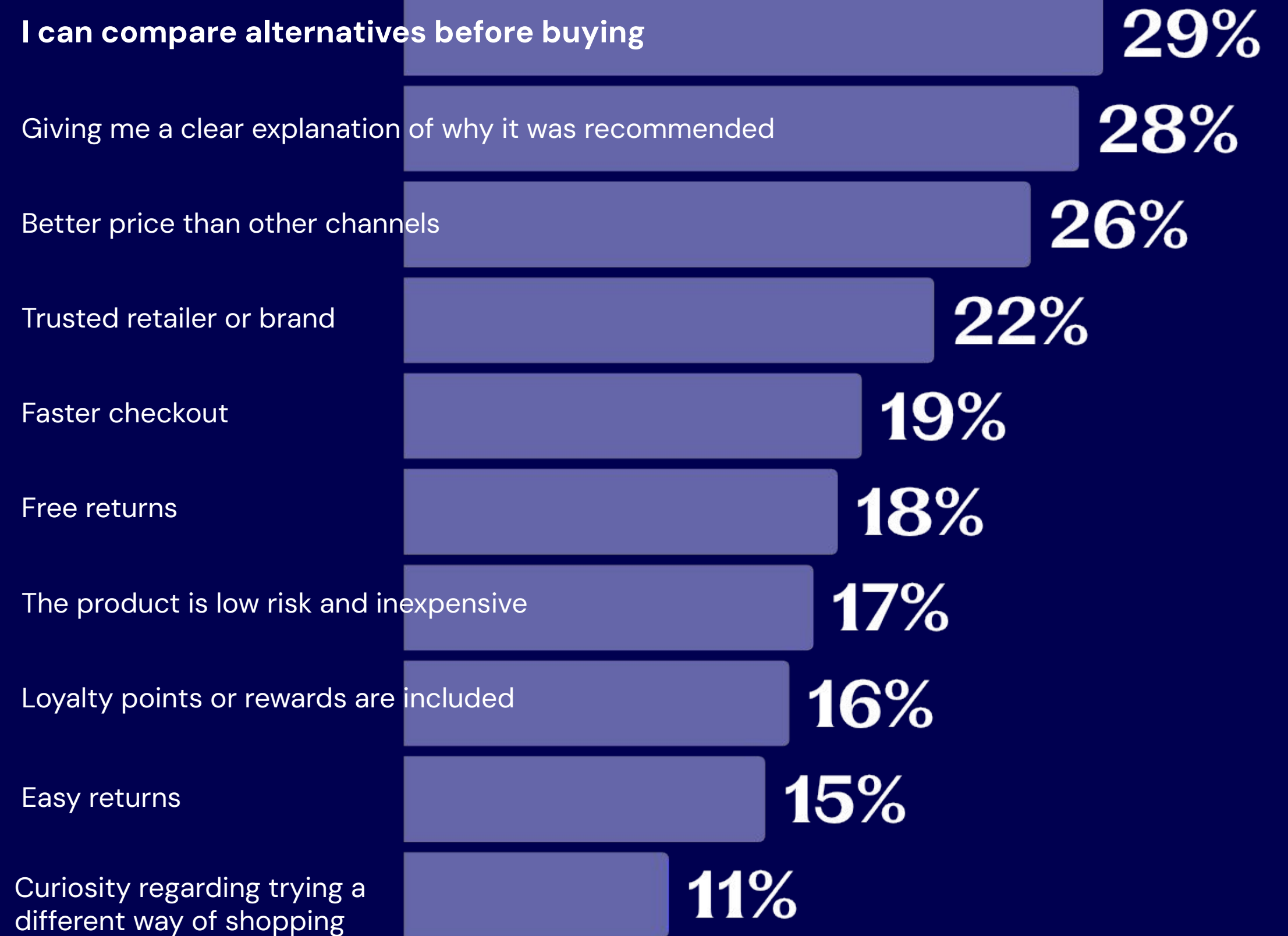
2

Helps me discover new brands/products I might want to buy

3

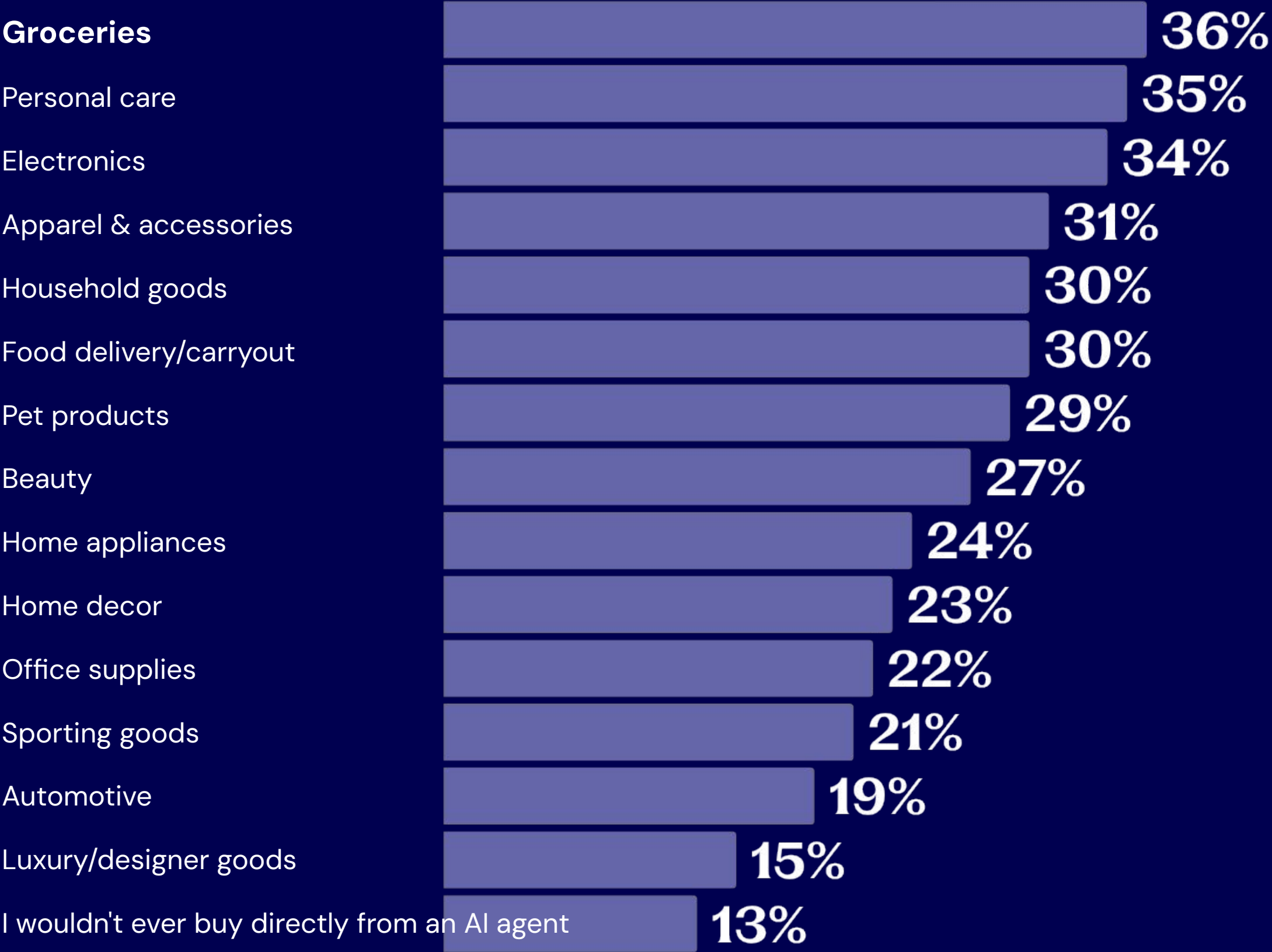
Imagine an AI agent recommends a product and gives you the option to buy immediately in the same conversation. What would make you most likely to complete the purchase there?

[Select 2]



In which categories would you be willing to complete a purchase directly inside an AI agent?

[Select all that apply]



Agents can become more trustworthy through transparent logic and communication

[Select 3]

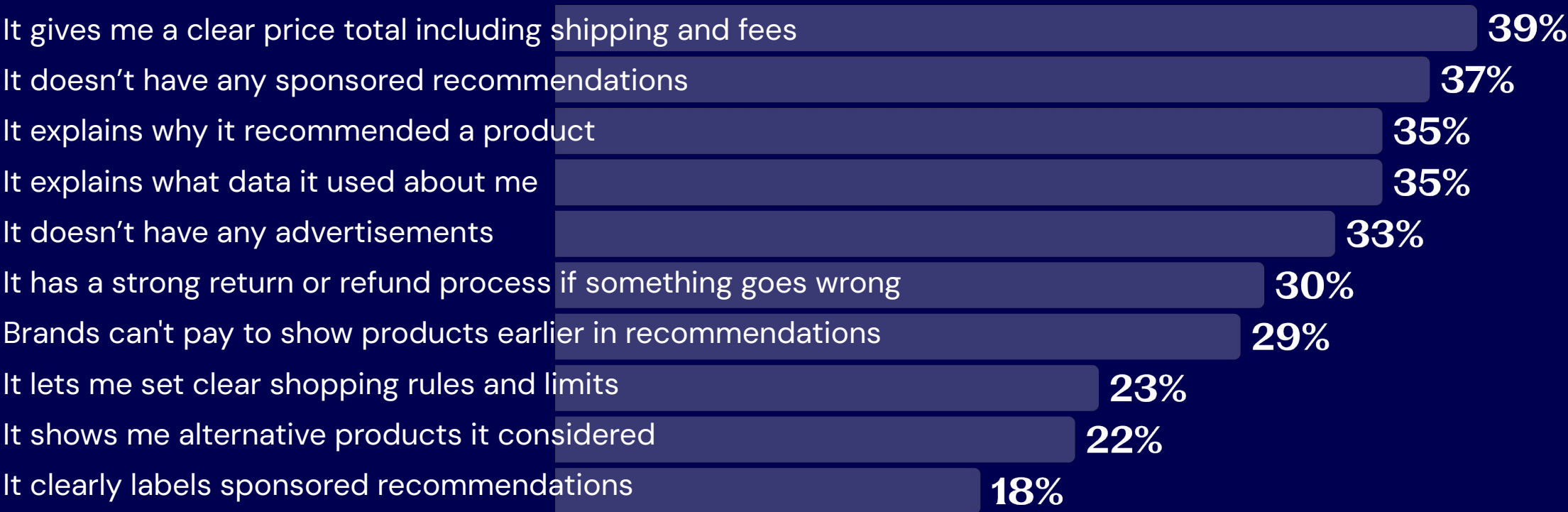
For agent open consumers:

Which of the following would make you more likely to trust an AI agent?

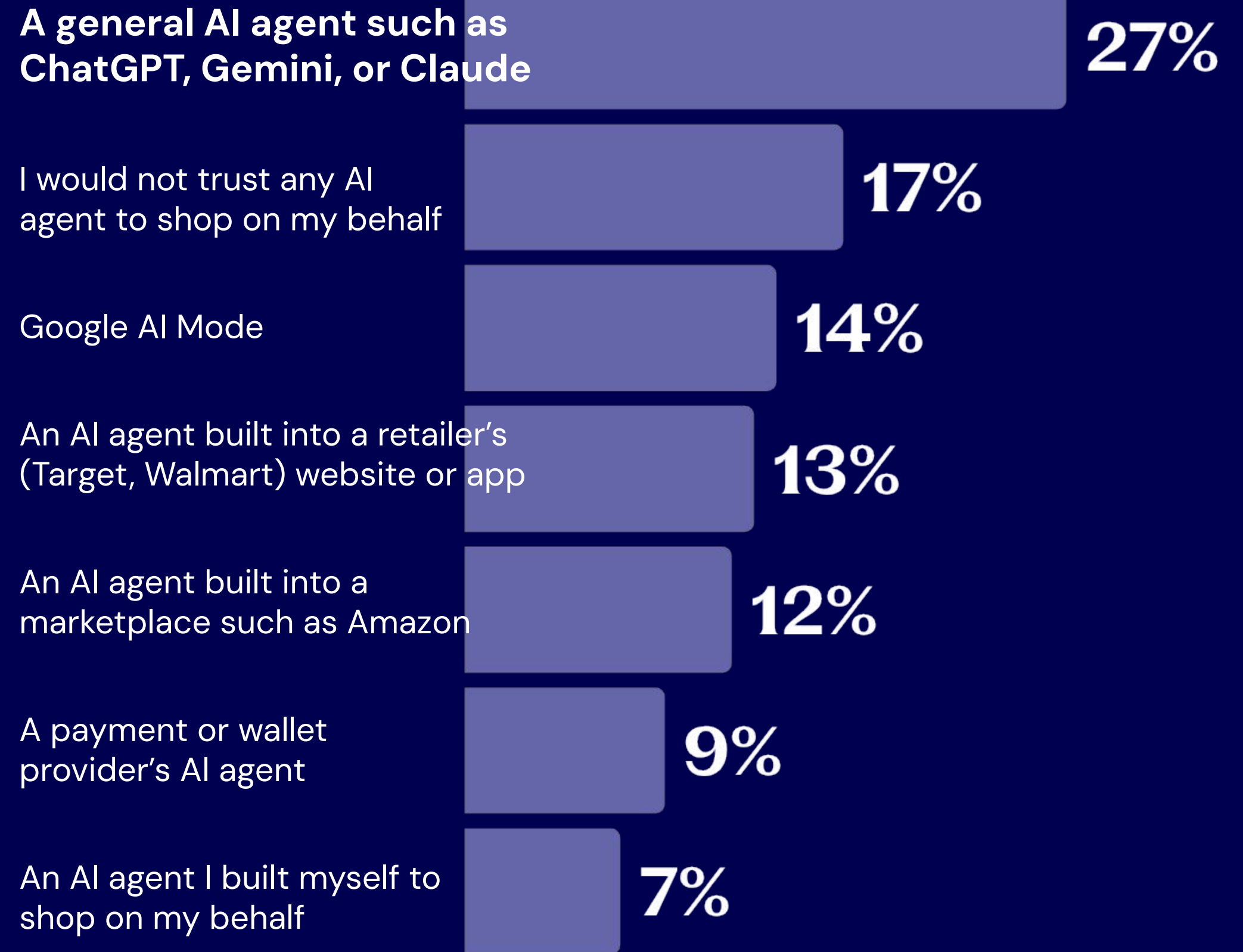


For agent non-open consumers:

Which of the following might make you open to using an AI agent for shopping?



In the future, you will be able to opt in to an AI agent doing the full shopping journey on your behalf. Which of the following would you trust most to act on your behalf when shopping?



Why might you choose to shop using ChatGPT, Claude, Gemini, Copilot or another AI agent instead of shopping directly on a retailer website or app or on a marketplace/search engine?

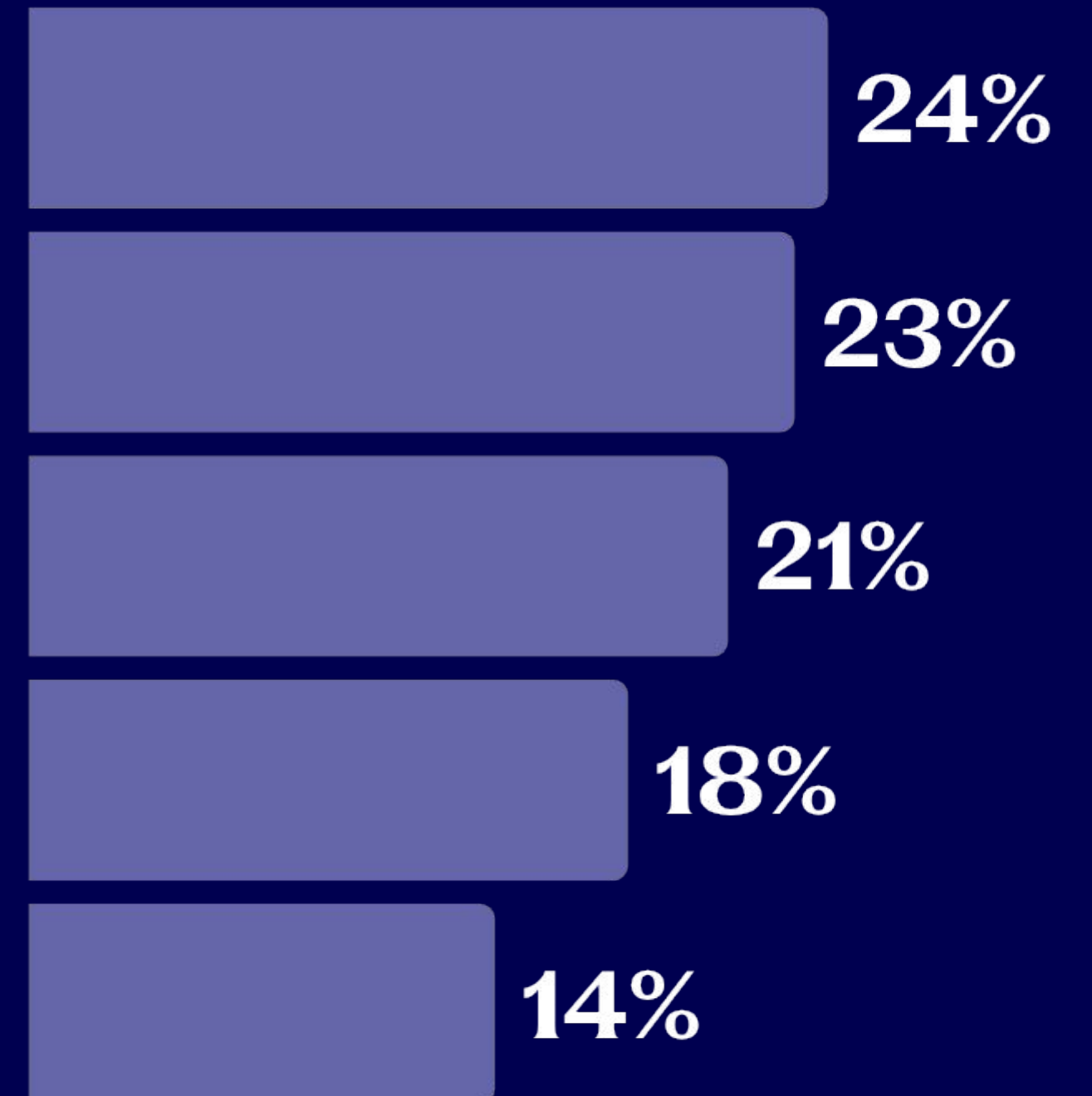
Easier to compare products/brands

More information for purchase decisions

Better prices

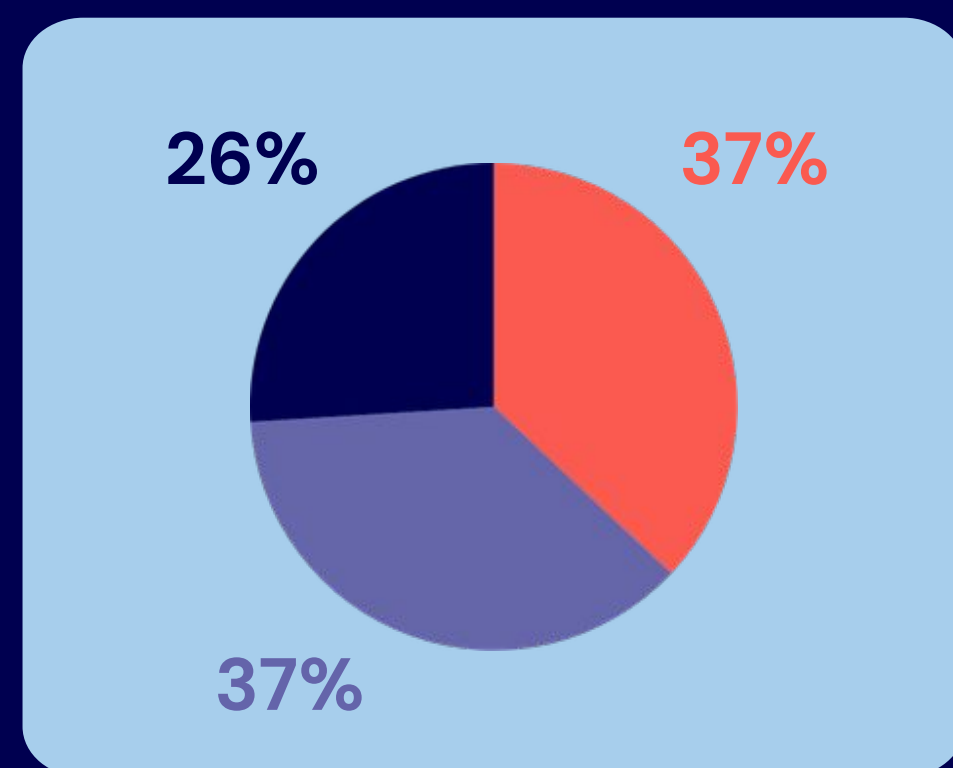
More efficient

Better recommendations for what to buy

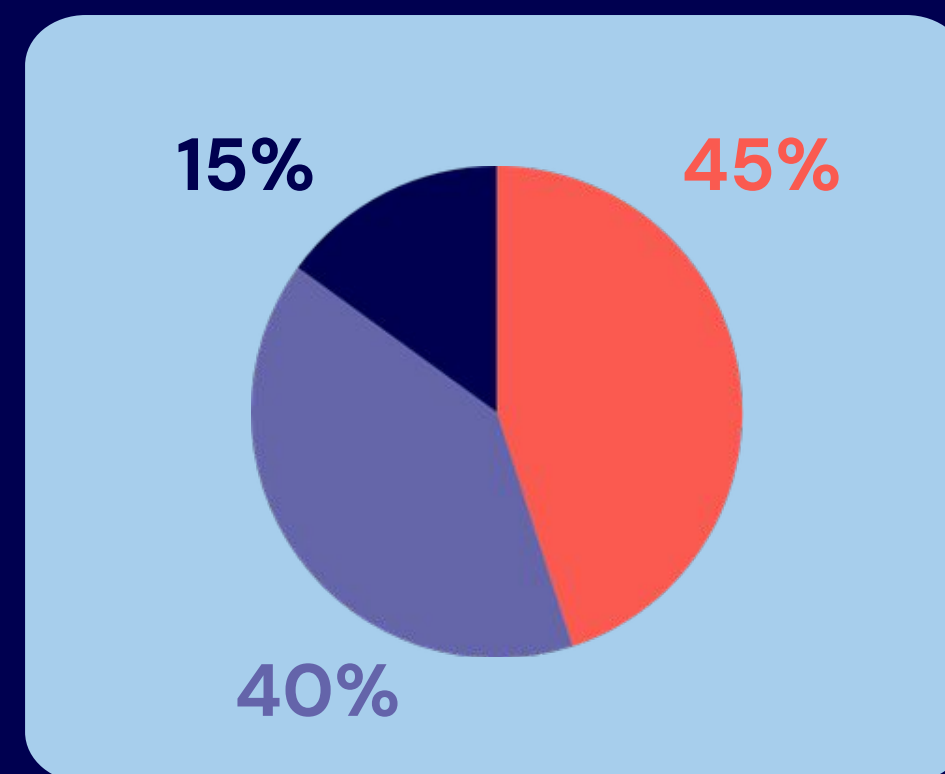


Paid search results are the least appealing approach to monetization

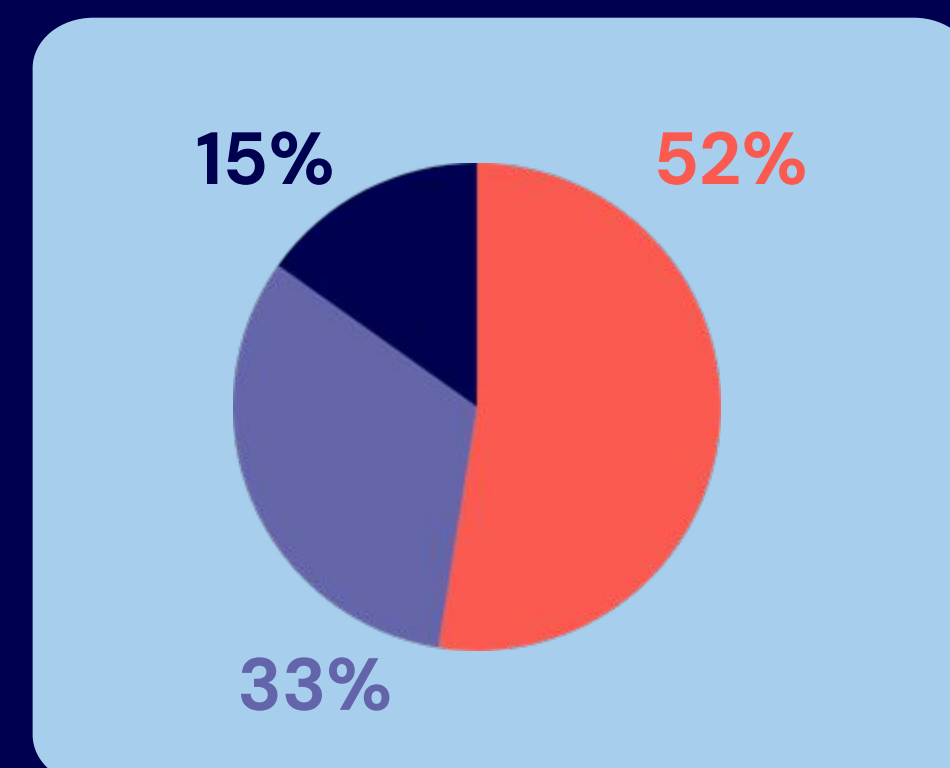
1. Platforms such as ChatGPT, Google Gemini, etc **organising search results in order based on how much the brand/retailer has paid them** to get them closer to the top of the results:



2. Platforms such as ChatGPT, Google Gemini, etc **advertising retailers or brands on the sidebar** of their platform:



3. Platforms such as ChatGPT, Google Gemini, etc. **advertising items that make sense for me on the sidebar** of their platform:



Would make me stop shopping on the platform



Wouldn't bother me at all



Would bother me slightly

CHANNEL NUANCE

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CHANNEL NUANCE

US



Are you more likely to choose a retailer's website that...

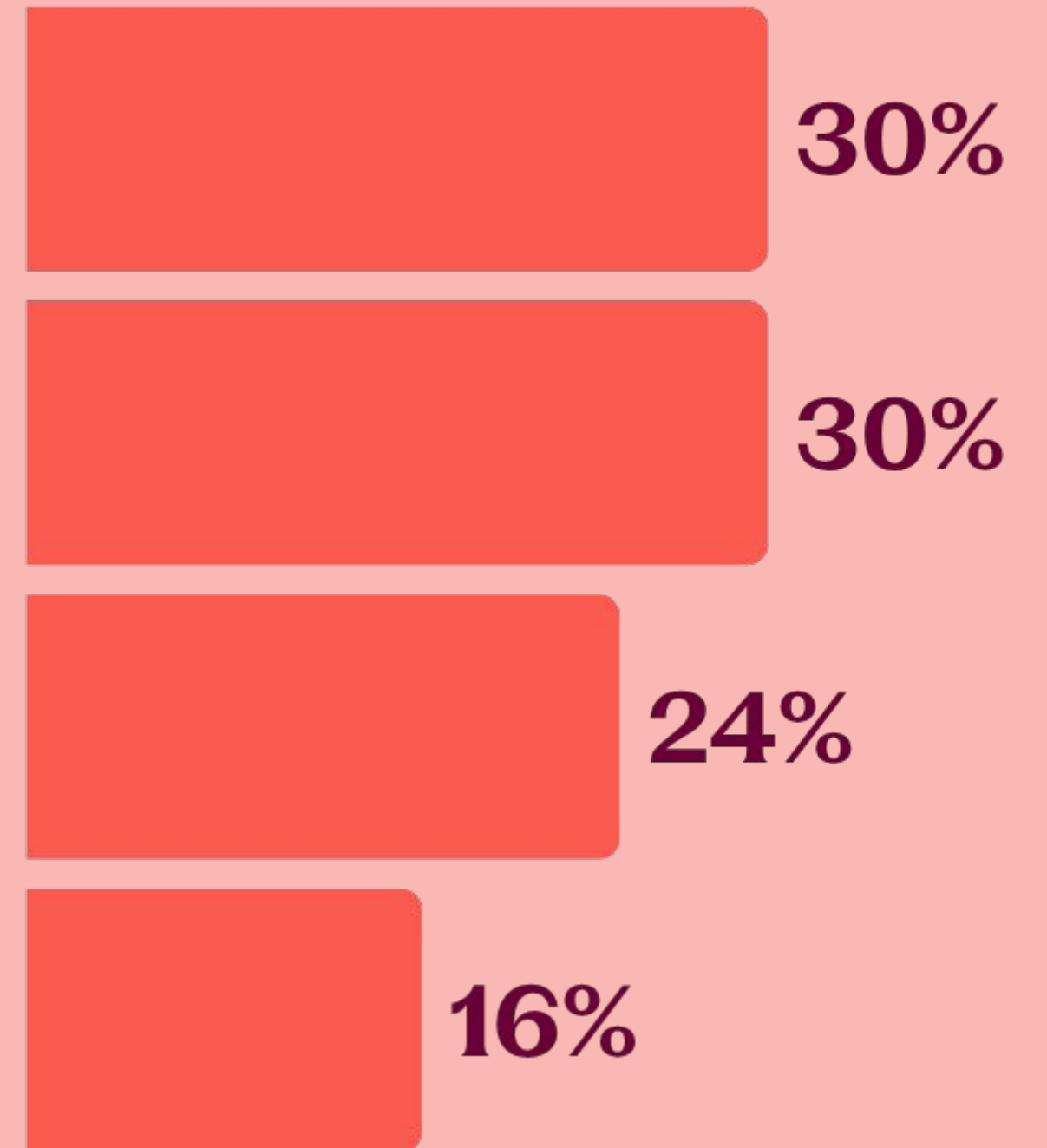
Consumers want efficient shopping experiences where they feel certain in their decisions

Is **quick and efficient** in getting you to the products you need

Provides **enough information quickly** to help you learn about a product category and feel confident making purchase decisions

Provides **elaborate amounts of information**, helping you learn about a product category and feel confident making purchase decisions

Is **fun and engaging**, allowing you to spend enjoyable time browsing



AI NATIVE CHANNELS FOR DISCOVERY

On **which channel** would you say you are/would **be most open** to discovering new brands/ products?

Rank the channels from where you're MOST open (1) to LEAST open (7)

- 1. Search Engine
- 2. Amazon or other marketplace
- 3. AI Agent

Google AI Mode, Retailer's Website
Retailer's App
Social Media

NON AI NATIVE CHANNELS FOR DISCOVERY

On **which channel** would you say you are **most open** to discovering new brands/products?

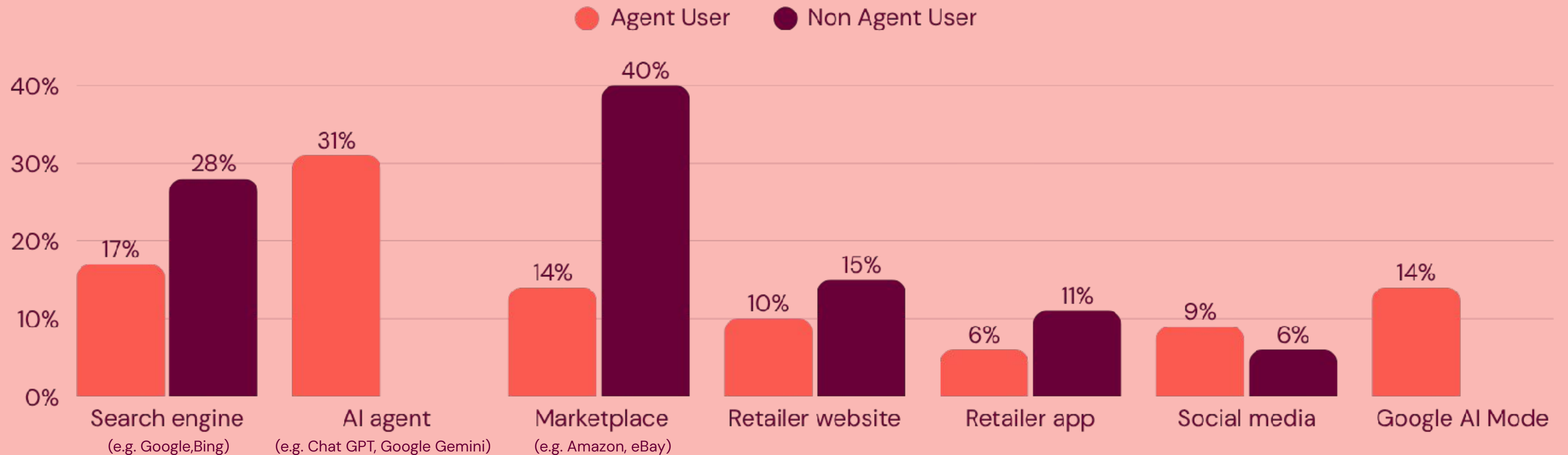
Rank the channels from where you're MOST open (1) to LEAST open (5)

- 1. Search Engine
- 2. Amazon or other marketplace
- 3. Retailer's Website

Retailer's App
Social Media

Which of the following gives you the best search experience when shopping?

Non-agent users favor marketplaces' search experiences, whereas agent users favor agents.



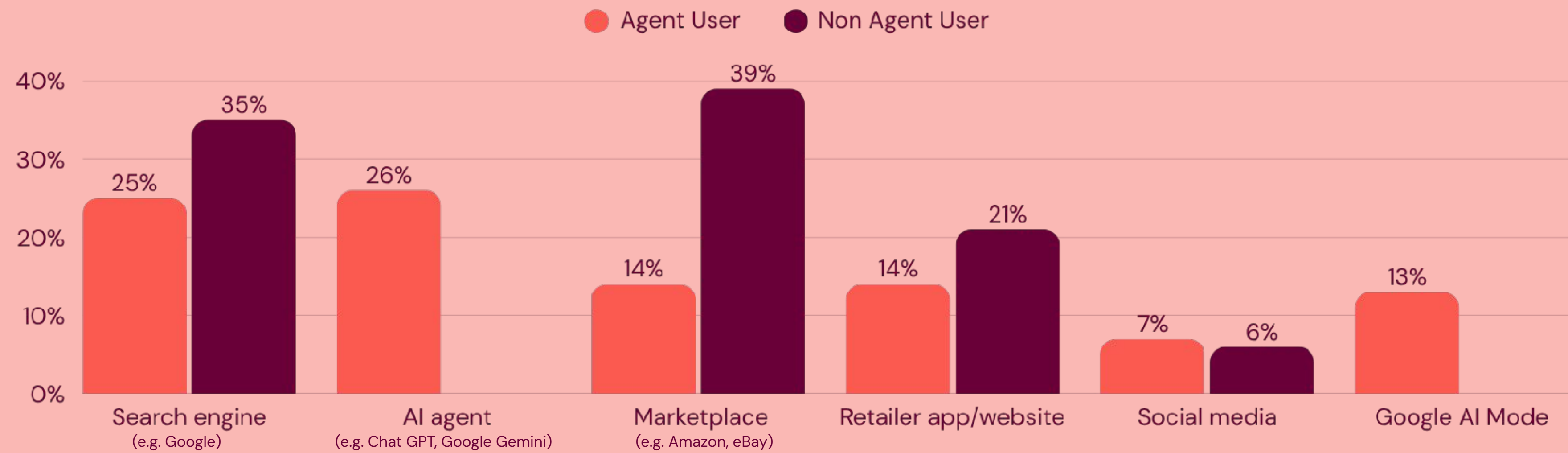
What makes for a good search experience?

[Select 3]

The best search experience is about price and specificity



Do you prefer to **start** your online shopping journey on...?



Channel you'd go to **first**

● Scenarios

● Categories

Agent user

Search Engine

- Household goods

Agent

- | | |
|--|---|
| <ul style="list-style-type: none">• Dealing with a problem such as skincare/ supplement program• Needing a new item without a brand preference• Looking for a dupe• Needing a new item with a brand preference• Lowest price without a brand preference• Lowest price with a brand preference• Searching for a specific size/color of a particular product• When I know the exact product I want but need the highest quality brand for it• When I don't know much about a product category but need to buy something in that category• Comparing prices between different brands• Comparing the same product offered by different brands• Styling or usage recommendations• Seeking product recommendations within a set budget• Buying for someone else | <ul style="list-style-type: none">• Beauty products• Personal care• Furniture• Home decor• Home appliances• Automotive• Electronics• Apparel and accessories• Pet products• Groceries• Sporting goods• Office supplies• Luxury/designer goods• Carryout/delivery |
|--|---|

Non-agent user

Search Engine

- | | |
|--|---|
| <ul style="list-style-type: none">• Dealing with a problem such as skincare/ supplement program• Looking for a dupe• Needing a new item with a brand preference• Lowest price without a brand preference• Lowest price with a brand preference• Searching for a specific size/color of a particular product• When I know the exact product I want but need the highest quality brand for it• When I don't know much about a product category but need to buy something in that category• Comparing prices between different brands• Comparing the same product offered by different brands• Styling or usage recommendations• Seeking product recommendations within a set budget• Buying for someone else | <ul style="list-style-type: none">• Beauty products• Furniture• Home decor• Home appliances• Automotive• Electronics• Pet products• Groceries• Sporting goods• Luxury/designer goods• Carryout/delivery• Household goods |
|--|---|

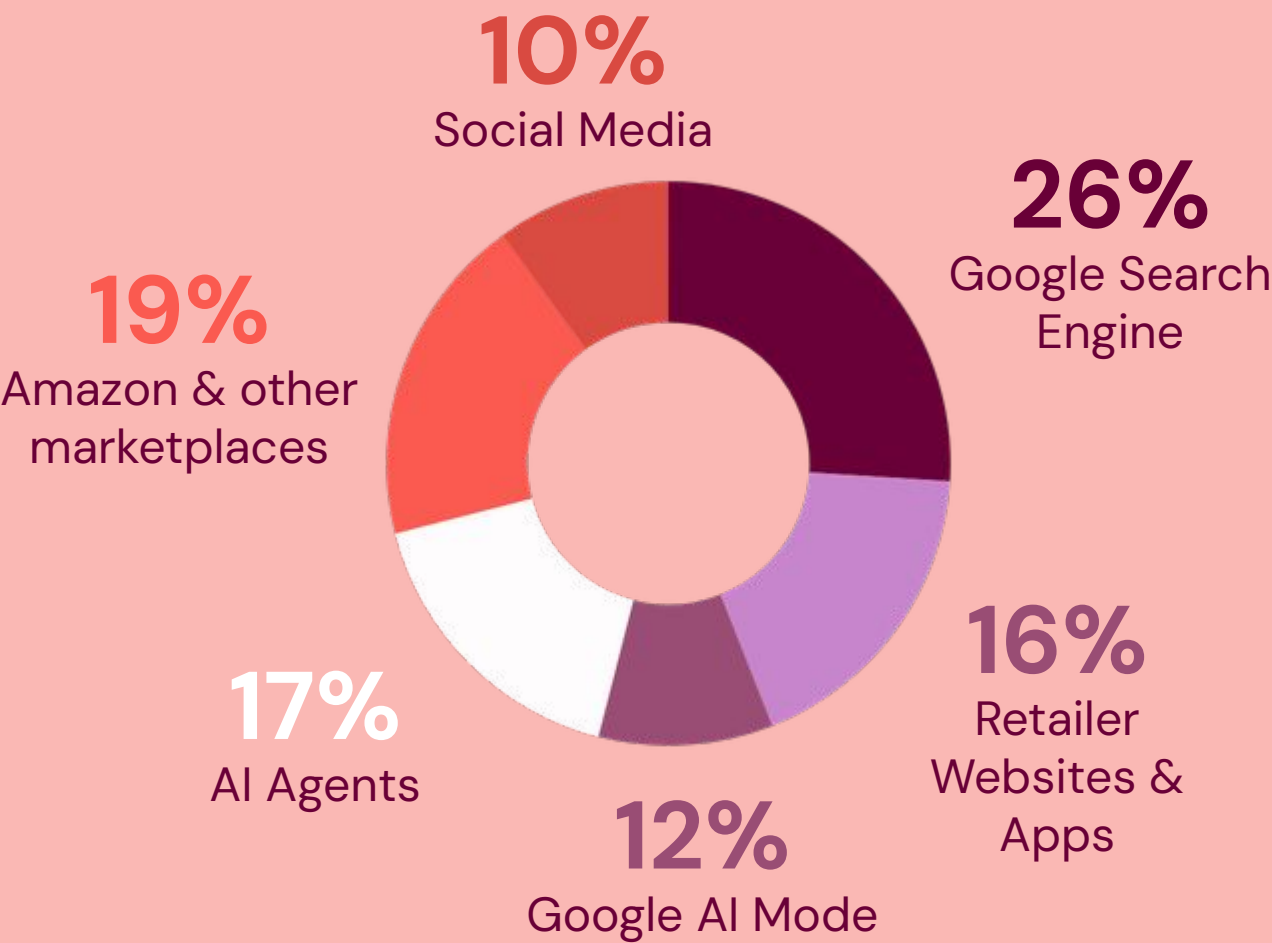
Marketplace

- | | |
|---|---|
| <ul style="list-style-type: none">• Needing a new item without a brand preference | <ul style="list-style-type: none">• Personal care• Apparel and accessories• Office supplies |
|---|---|

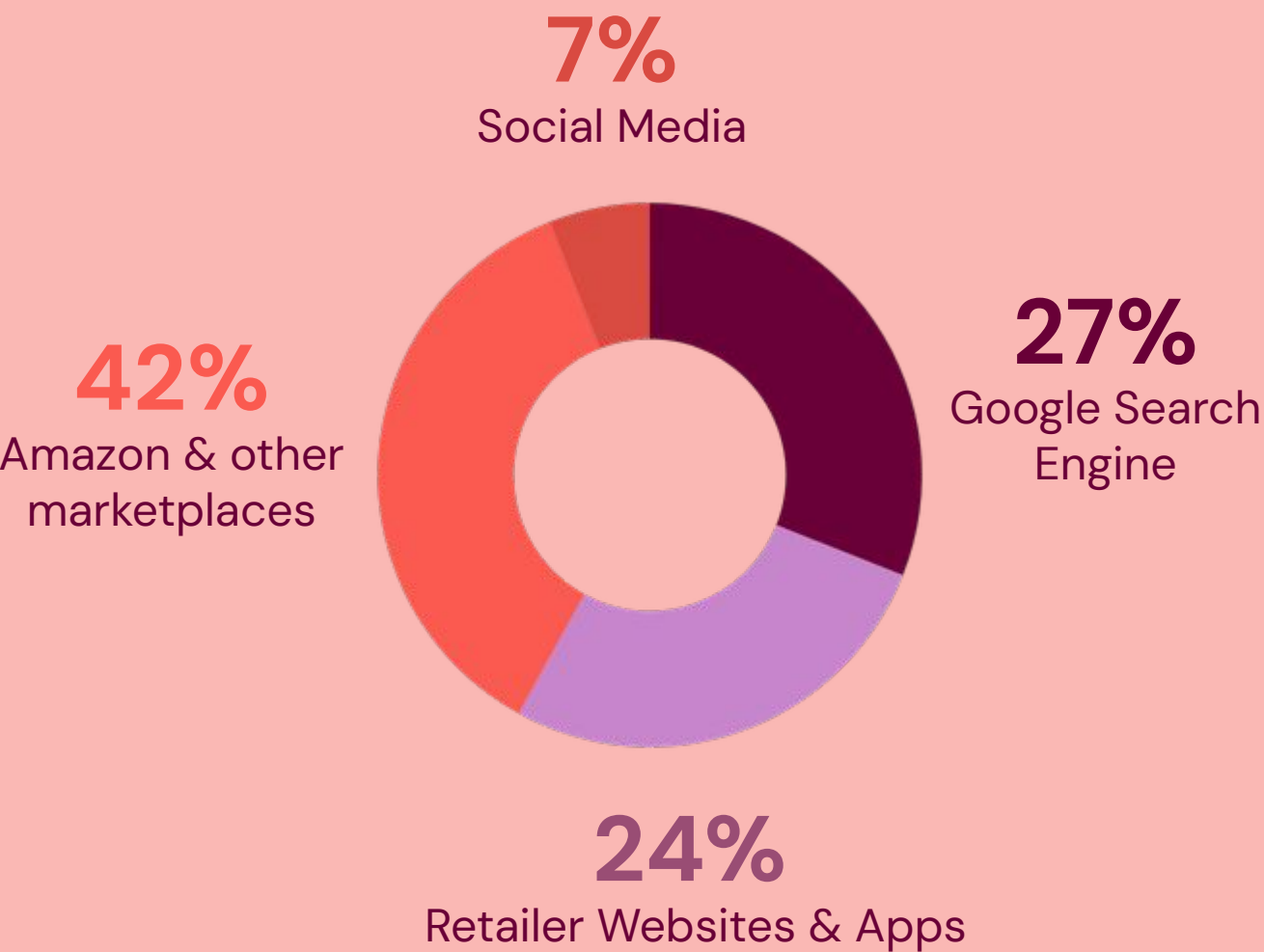
Please assign percentages, adding up to a total of 100, to each channel in order to best represent

how often you typically shop them online:

AI NATIVE SHOPPER



NON-AI NATIVE SHOPPER





LOYALTY

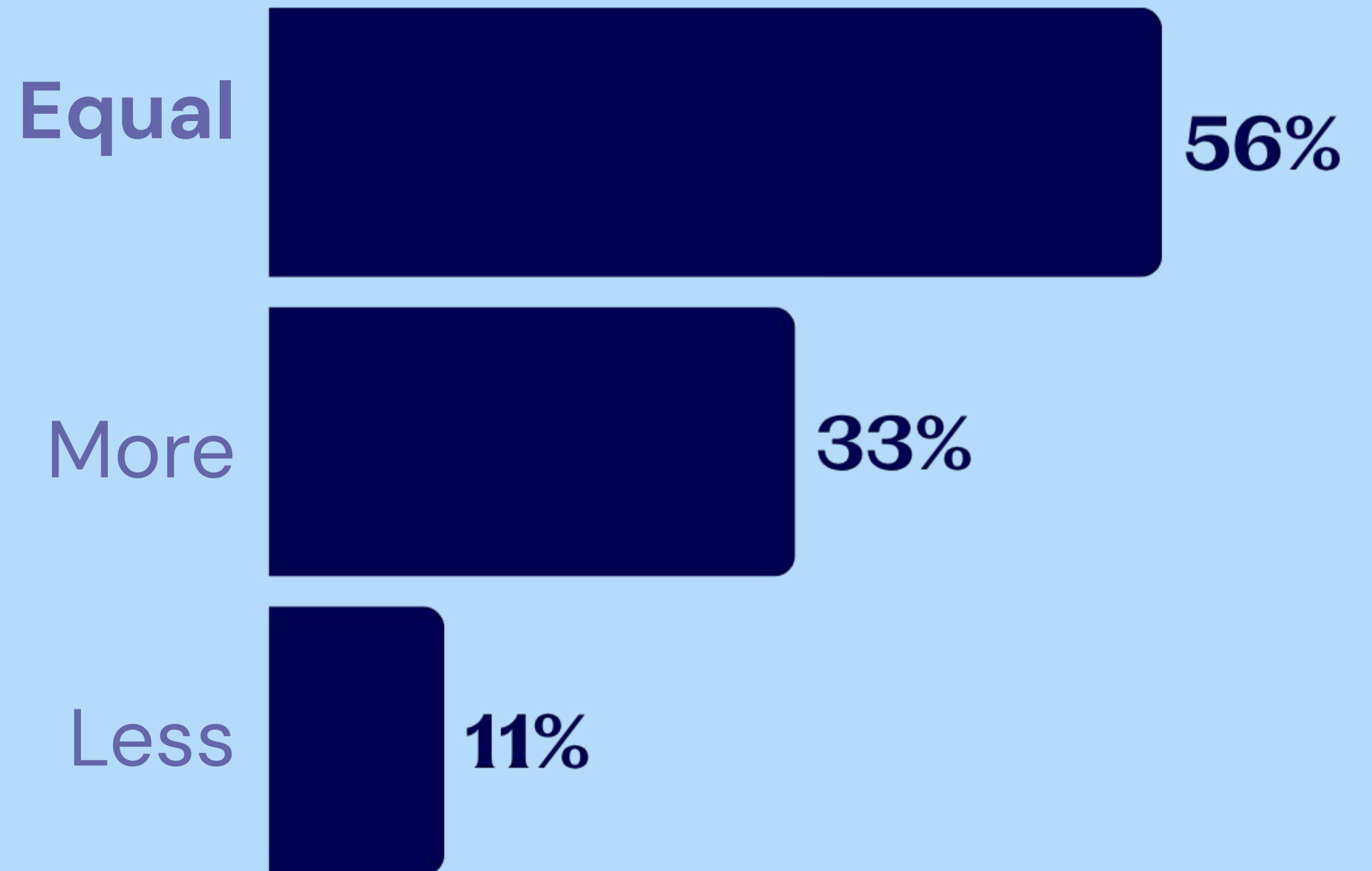
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LOYALTY

US

Compared to a year ago, would you say you are more, less, or equally loyal to the brands you buy?



Which of the following are most likely to make you loyal to a brand or retailer?

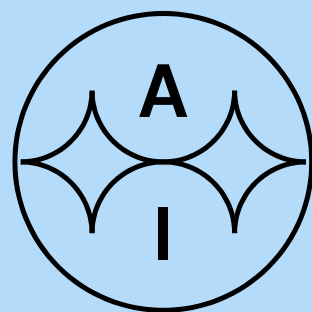
[Select 3]



Categories where consumers report the strongest brand loyalty

Brand loyalty

Rank the following categories, in order **from 1** the one where you consider yourself to be **MOST** loyal to specific brands, to **14** the one where you tend to have the **LEAST** brand loyalties



1. Personal care
2. Beauty
3. Household goods

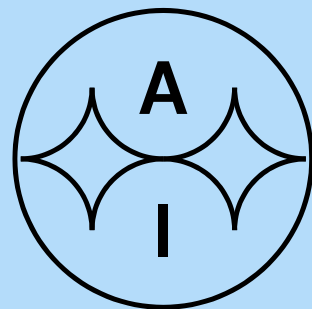
4. Groceries
5. Electronics
6. Furniture
7. Home appliances
8. Apparel & accessories
9. Home decor
10. Automotive
11. Pet products
12. Sporting goods
13. Office supplies
14. Luxury/designer goods

Categories with highest likelihood of loyalty program participation

Loyalty Programs

In which of the following categories do you belong to loyalty programs?

[Select all that apply]



1. Groceries
2. Pet products
3. Coffee shops

4. Restaurant chains
5. Apparel & accessories
6. Beauty products
7. Personal care, Electronics
8. Household goods, Automotive
9. Sporting goods, I don't belong to any
10. Home appliances
11. Home decor, Office supplies
12. Furniture, Luxury/designer goods



IN CONCLUSION

If agents are to be perceived as replacing anything, they are technically cannibalizing usage across all channels, but they're mostly replacing search engines and/or marketplaces.

IMPLICATIONS

Create different reasons for shoppers to engage with your brand on each platform. Offer different experiences, products, and incentives for each.

Agents' purpose to consumers is to provide the best search experience possible

○

IMPLICATIONS

Optimize discoverability in the context of price and the variables consumers would be evaluating your product on

Agents are for research more often than for learning

IMPLICATIONS

Utilize your proprietary channels in ways that provide learning opportunities for shoppers and enhance LLM discoverability by designing a strategy that's centered around the specific research shoppers would be doing to find you in the category

APPENDIX



SCENARIO SLIDES

2026

RETAIL TECH REPORT: AGENTIC EDITION

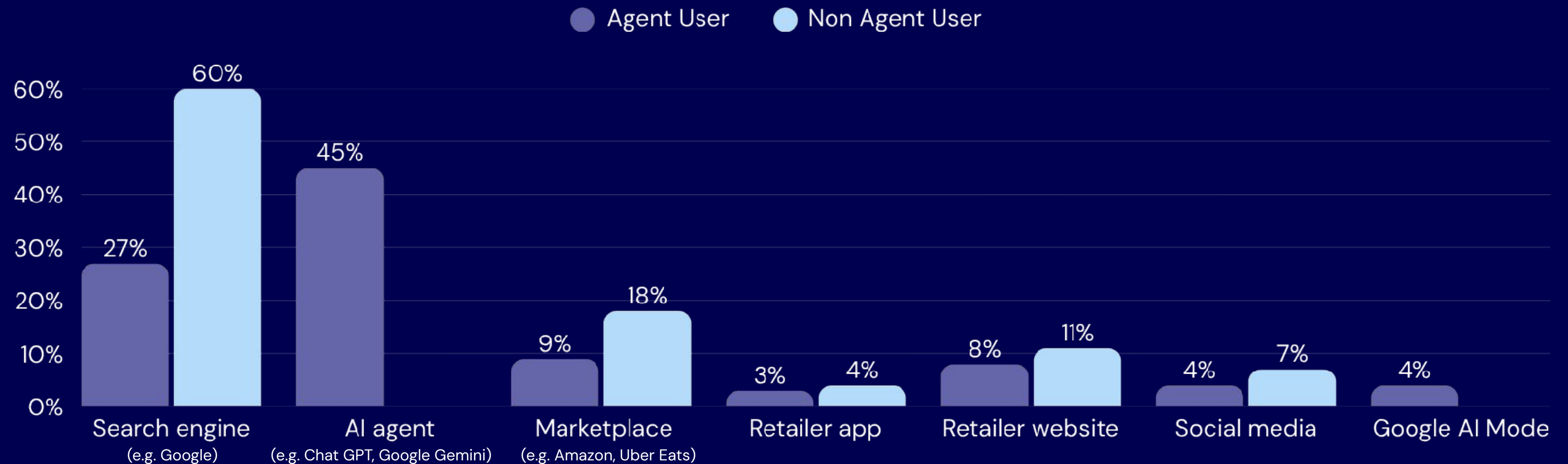
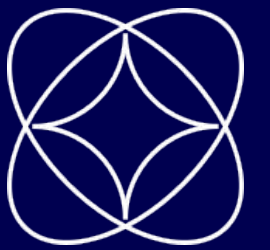
APPENDIX

SCENARIO

US

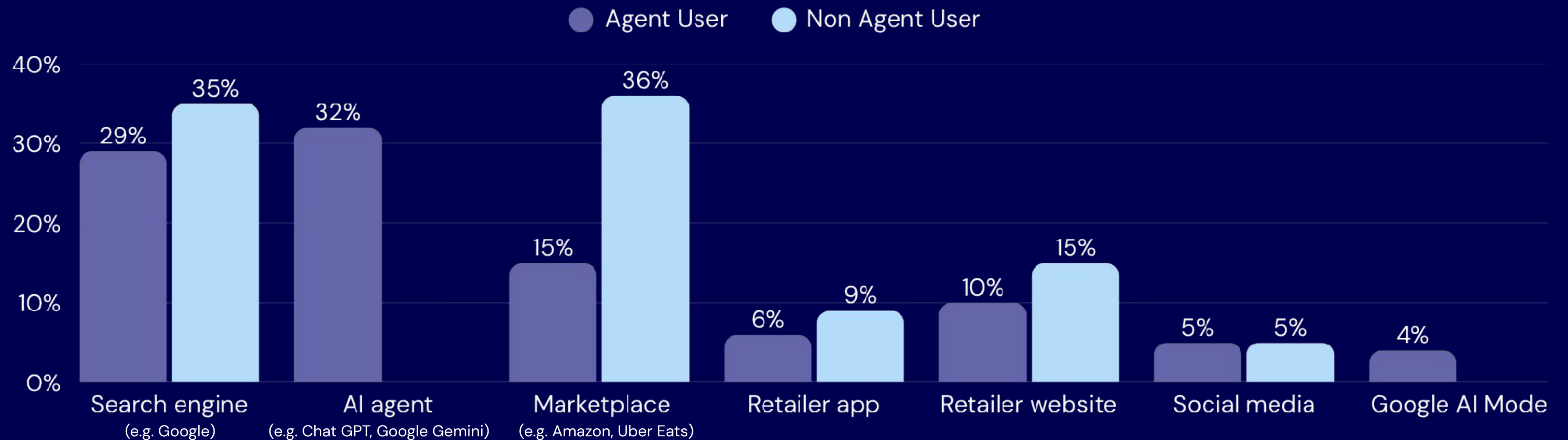
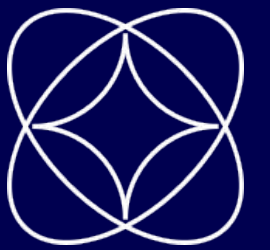
For each of the following shopping scenarios, please select the digital channel you would most likely go to FIRST:

Dealing with a problem such as acne/refreshing your skincare routine, a leaky faucet, needing to bake for the holidays, putting together a wellness/supplement program



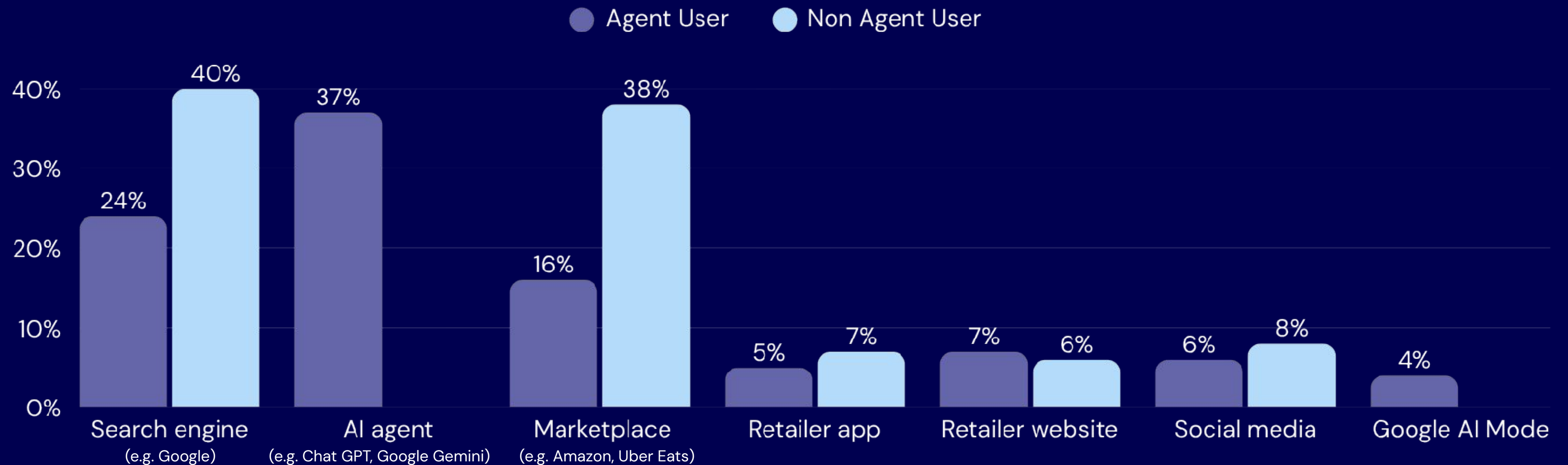
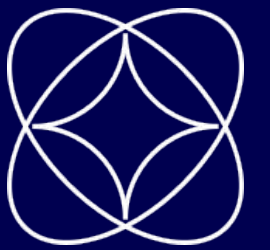
For each of the following shopping scenarios, please select the digital channel you would most likely go to FIRST:

Needing a new item without a brand preference (moisturizer, sweater, sneakers, car)



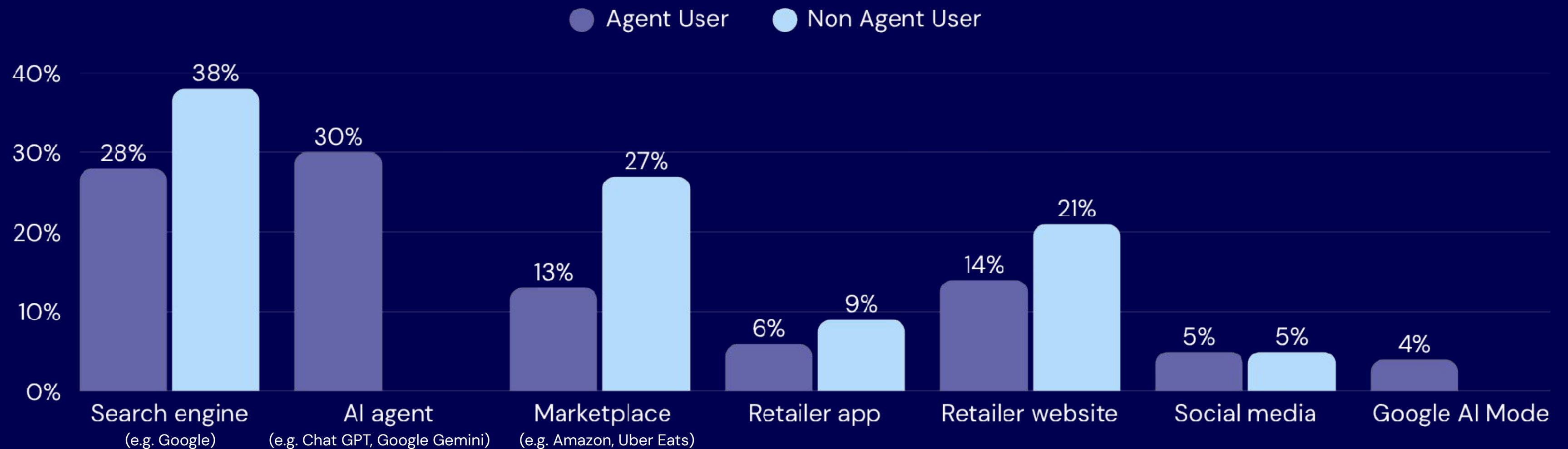
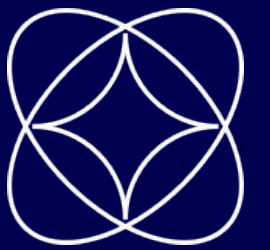
For each of the following shopping scenarios, please select the digital channel you would most likely go to FIRST:

Looking for a dupe of an item (less expensive version of a luxury item)



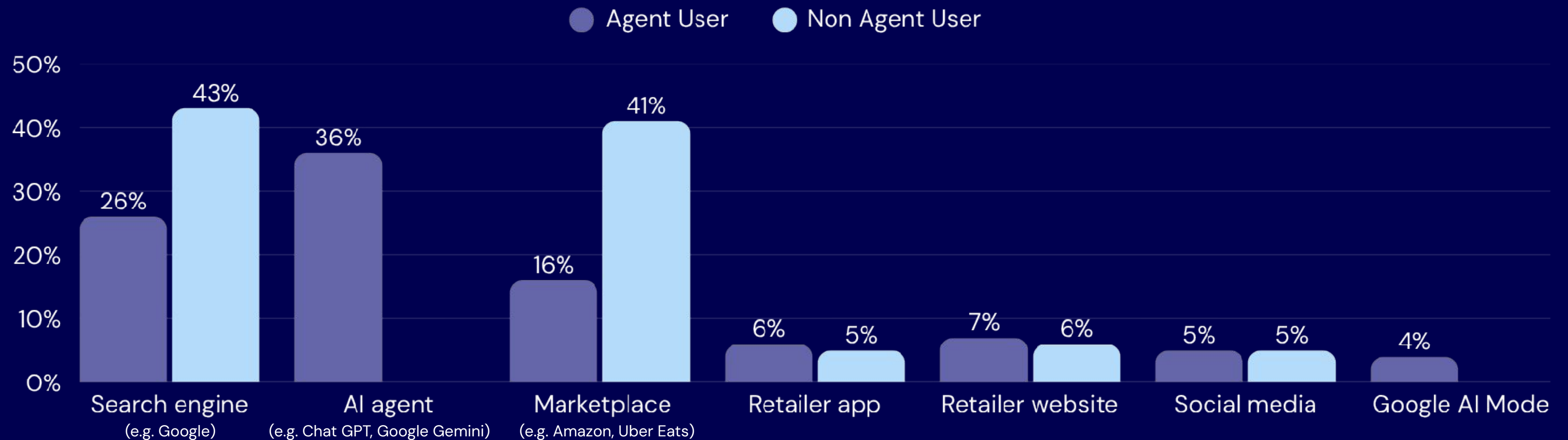
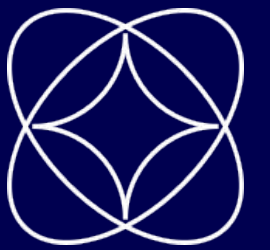
For each of the following shopping scenarios, please select the digital channel you would most likely go to FIRST:

Needing a new item with a brand preference in mind (moisturizer, sweater, sneakers, car)



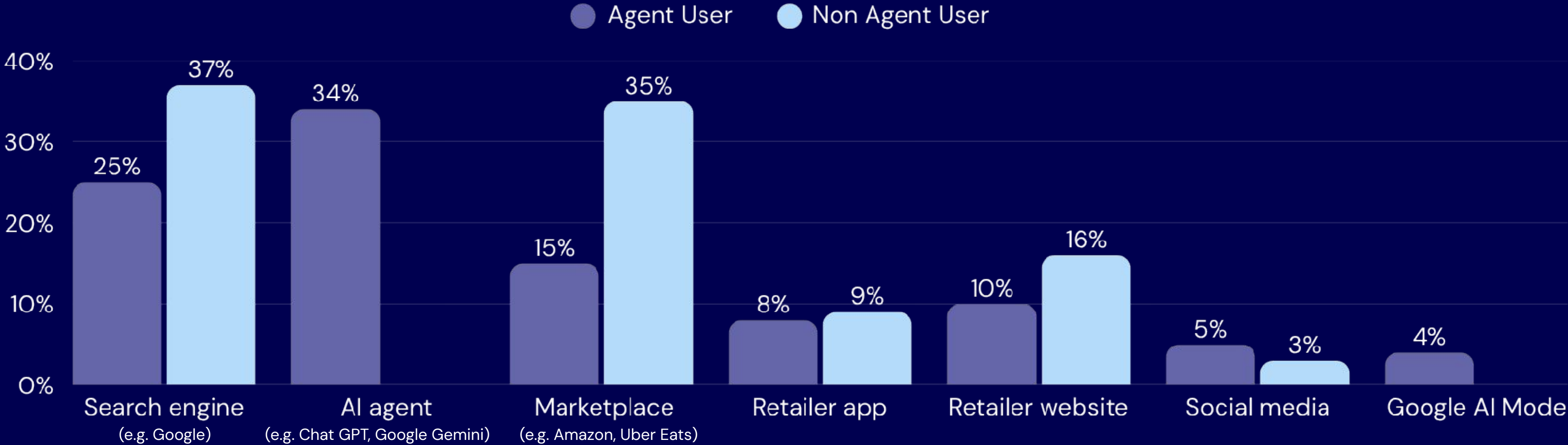
For each of the following shopping scenarios, please select the digital channel you would most likely go to FIRST:

Wanting the lowest price for an item without a brand preference



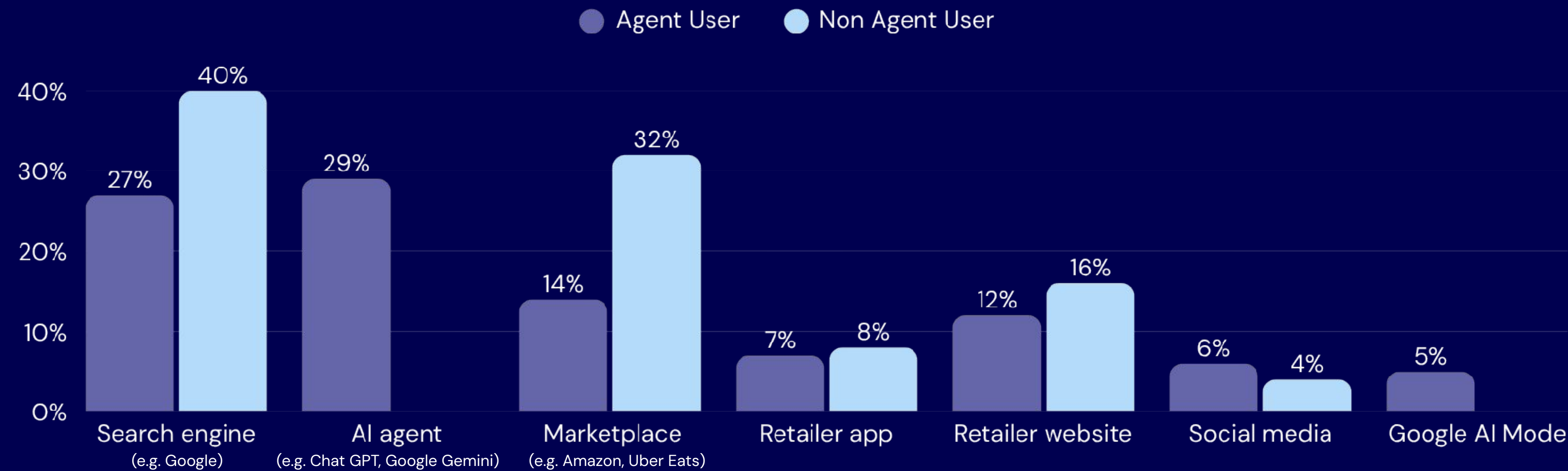
For each of the following shopping scenarios, please select the digital channel you would most likely go to FIRST:

Wanting the lowest price for an item with a brand preference in mind



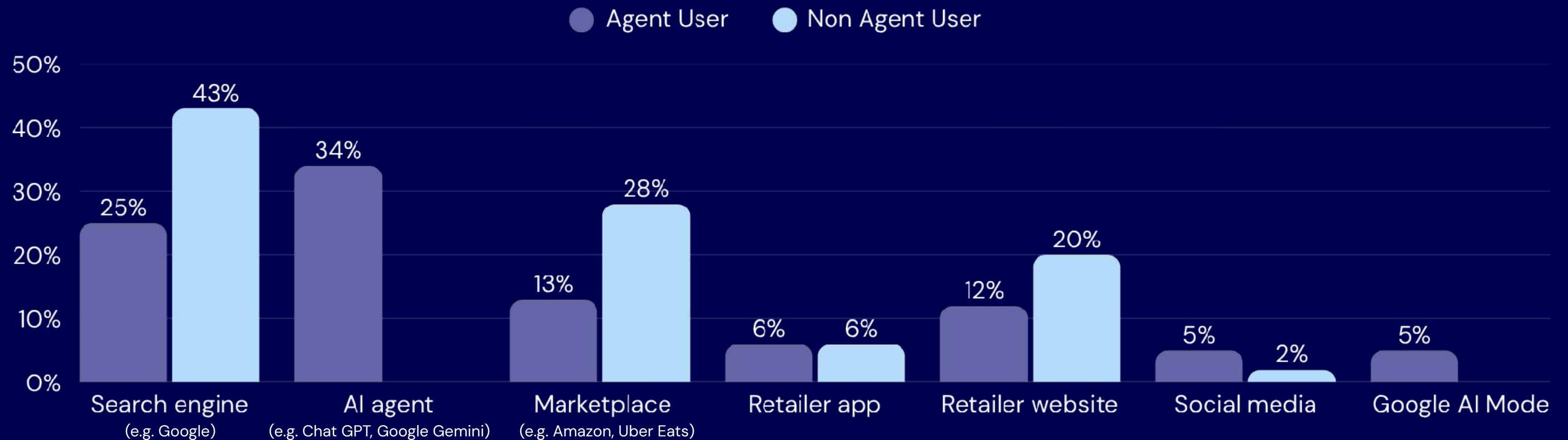
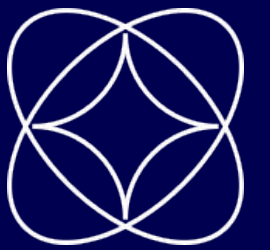
For each of the following shopping scenarios, please select the digital channel you would most likely go to FIRST:

Searching for a specific size or color of a particular product



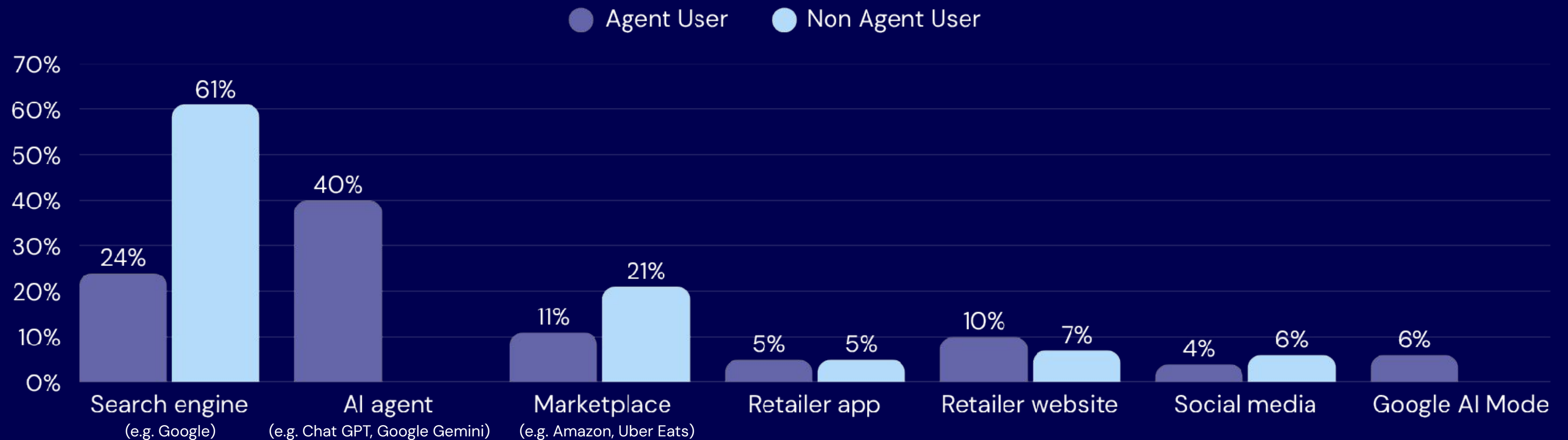
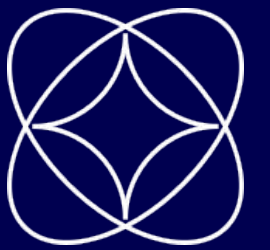
For each of the following shopping scenarios, please select the digital channel you would most likely go to FIRST:

When I know the exact product I want but need the highest quality brand for it.



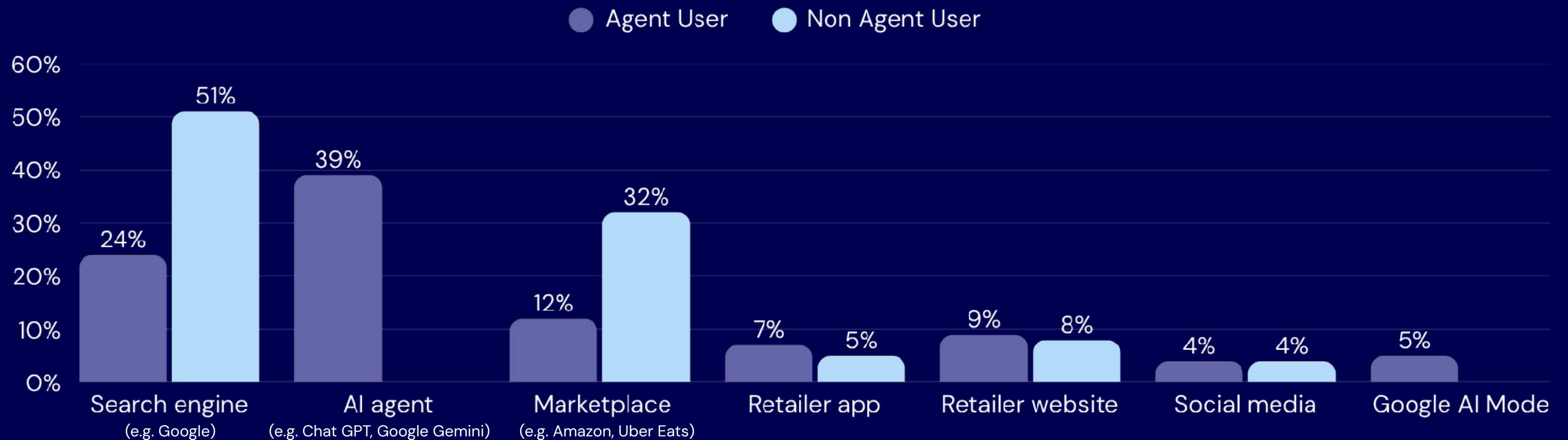
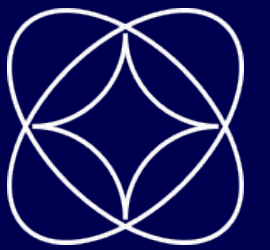
For each of the following shopping scenarios, please select the digital channel you would most likely go to FIRST:

When I don't know much about a product category (laptops, headphones, cars, denim), but I need to buy something in that category



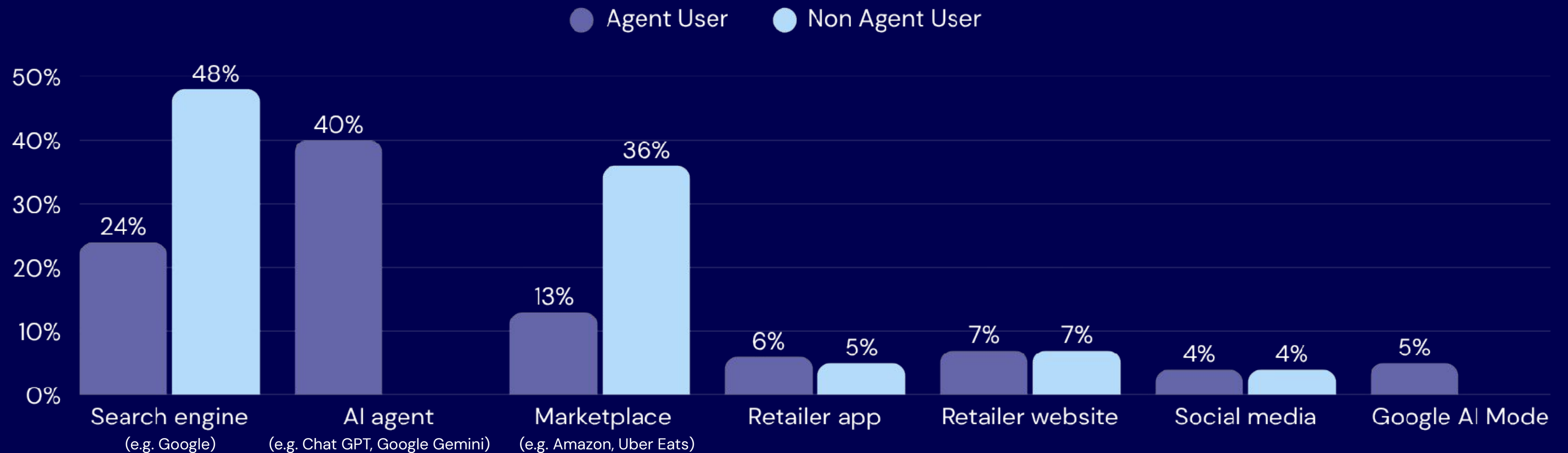
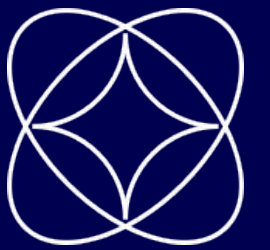
For each of the following shopping scenarios, please select the digital channel you would most likely go to FIRST:

When I want to compare prices between different brands offering the same product



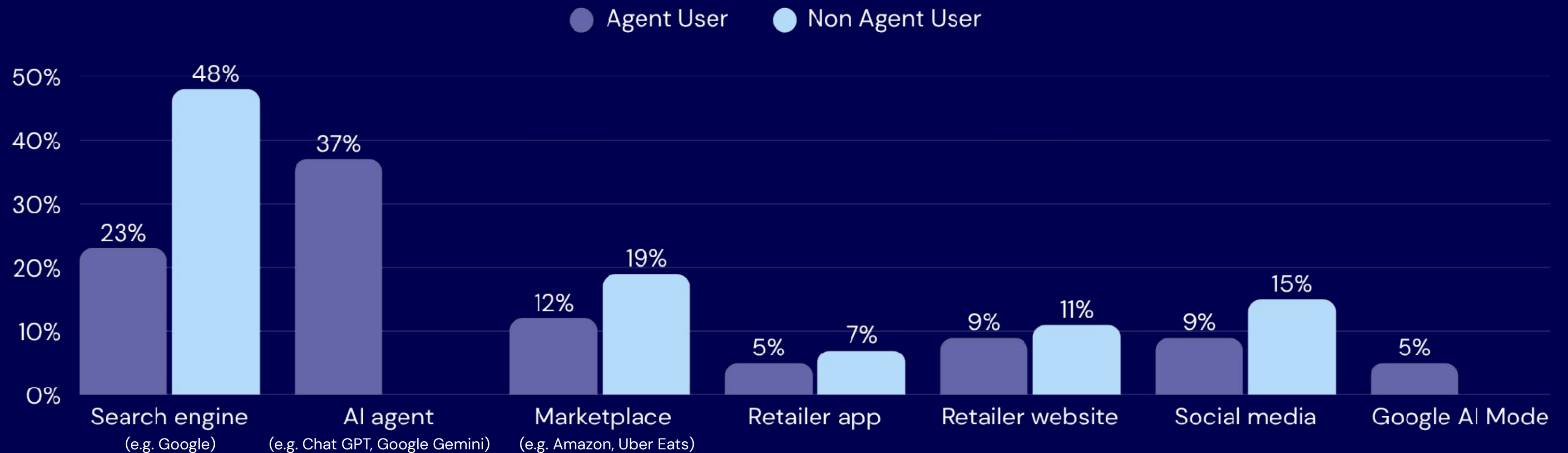
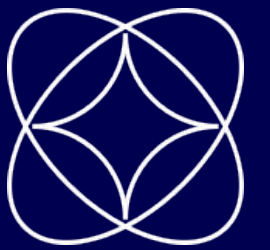
For each of the following shopping scenarios, please select the digital channel you would most likely go to FIRST:

When I want to compare the same product offered by different brands



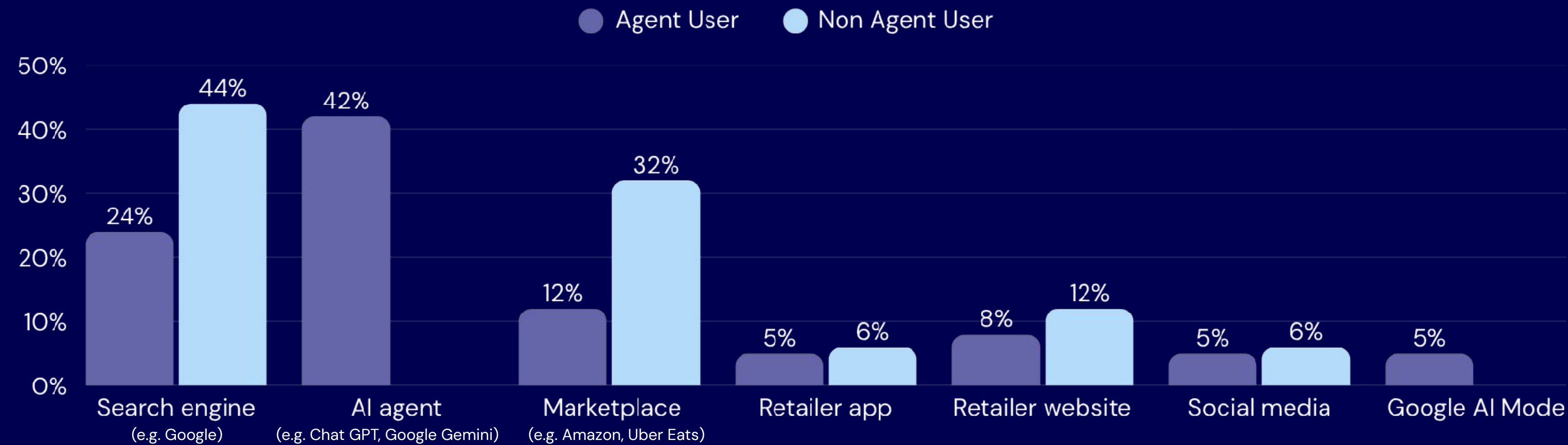
For each of the following shopping scenarios, please select the digital channel you would most likely go to FIRST:

When I want recommendations for styling or using an item I already have or am going to buy



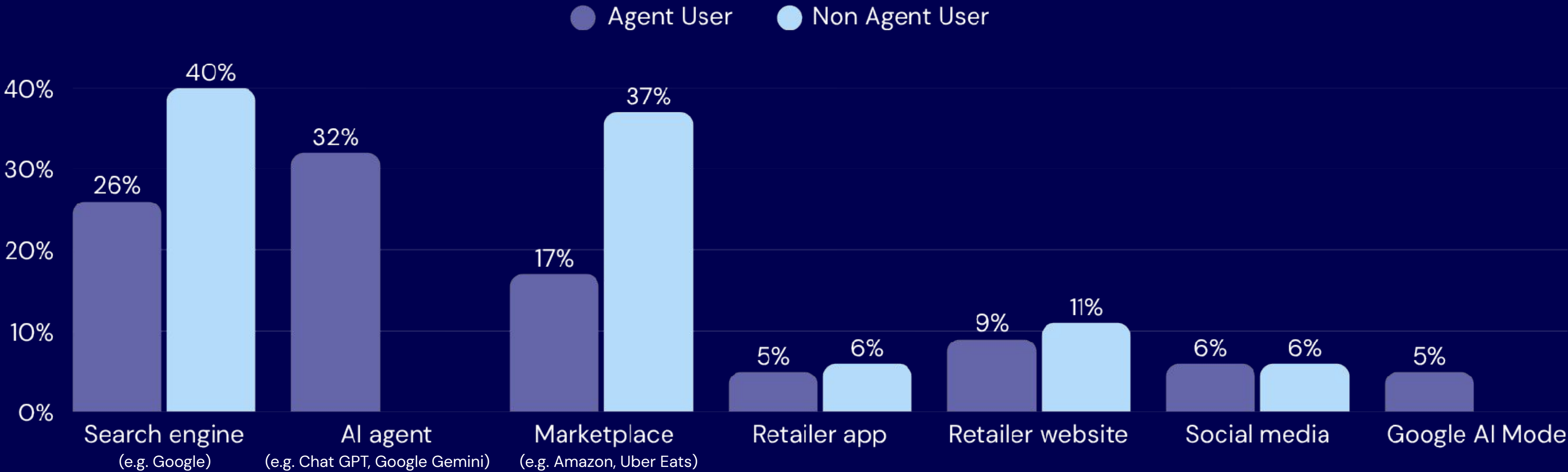
For each of the following shopping scenarios, please select the digital channel you would most likely go to FIRST:

When I want product recommendations that fit within a set budget



For each of the following shopping scenarios, please select the digital channel you would most likely go to FIRST:

When I am buying something for someone else





CATEGORY SLIDES

2026

RETAIL TECH REPORT: AGENTIC EDITION

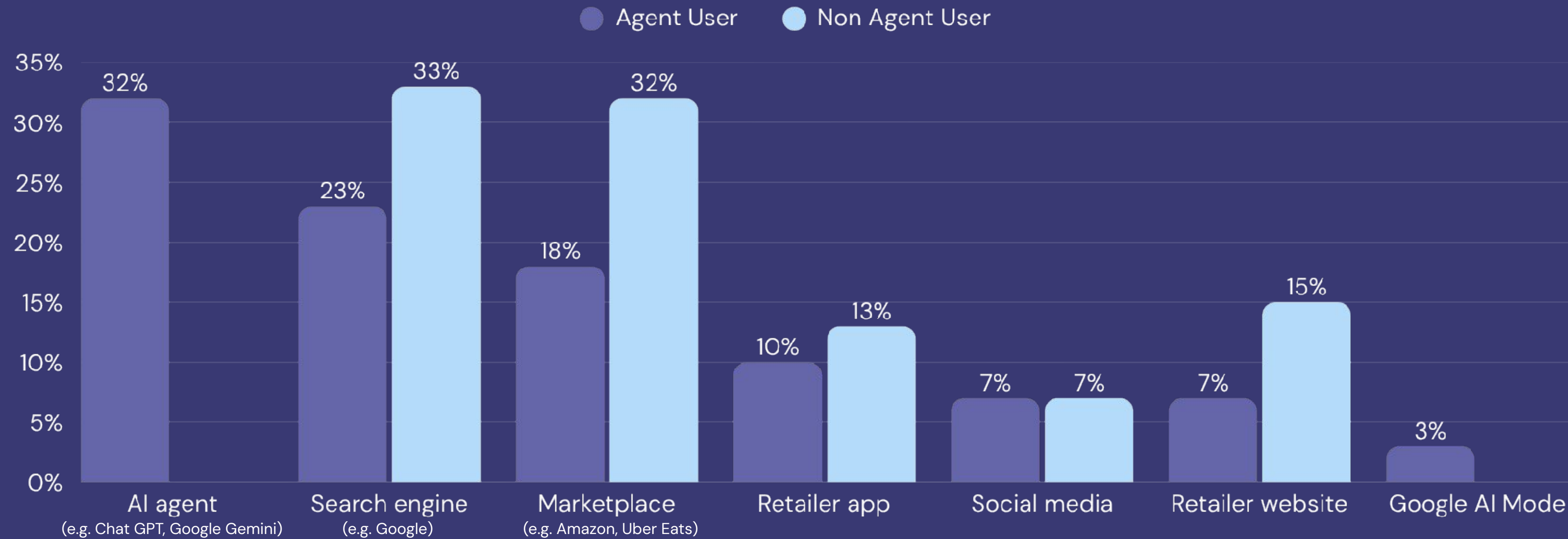
APPENDIX

CATEGORY

US

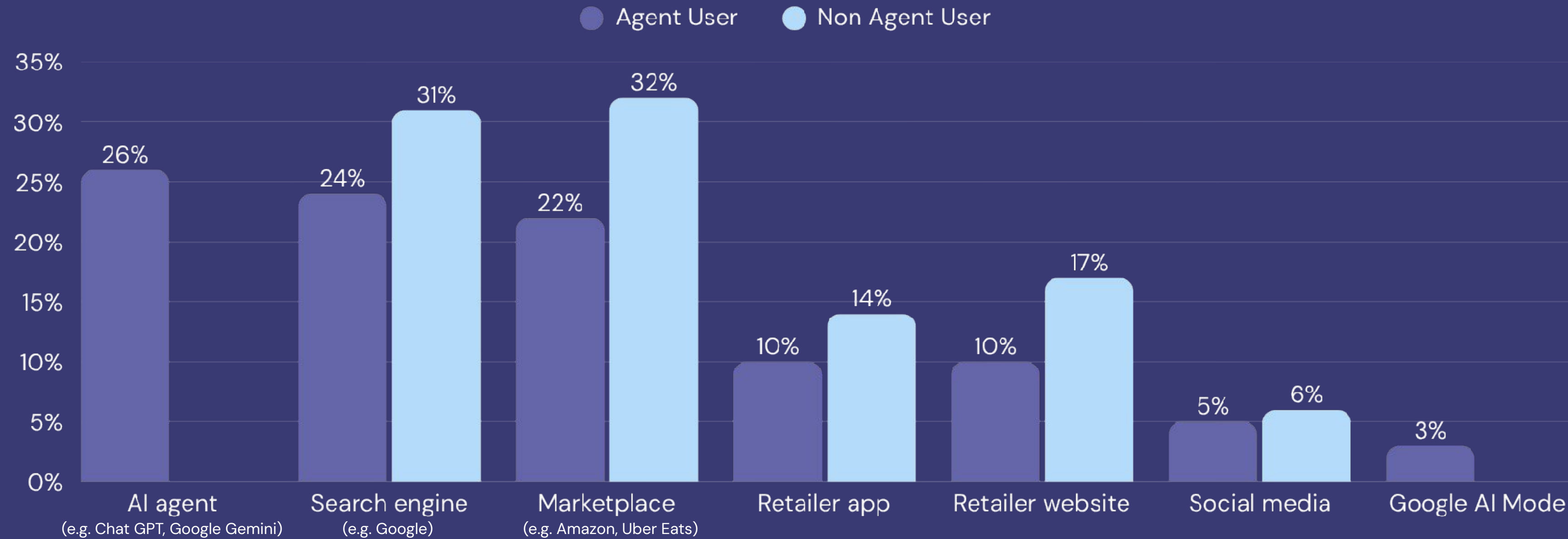
For each of the following categories, please select the digital channel you would most likely go to FIRST:

BEAUTY PRODUCTS



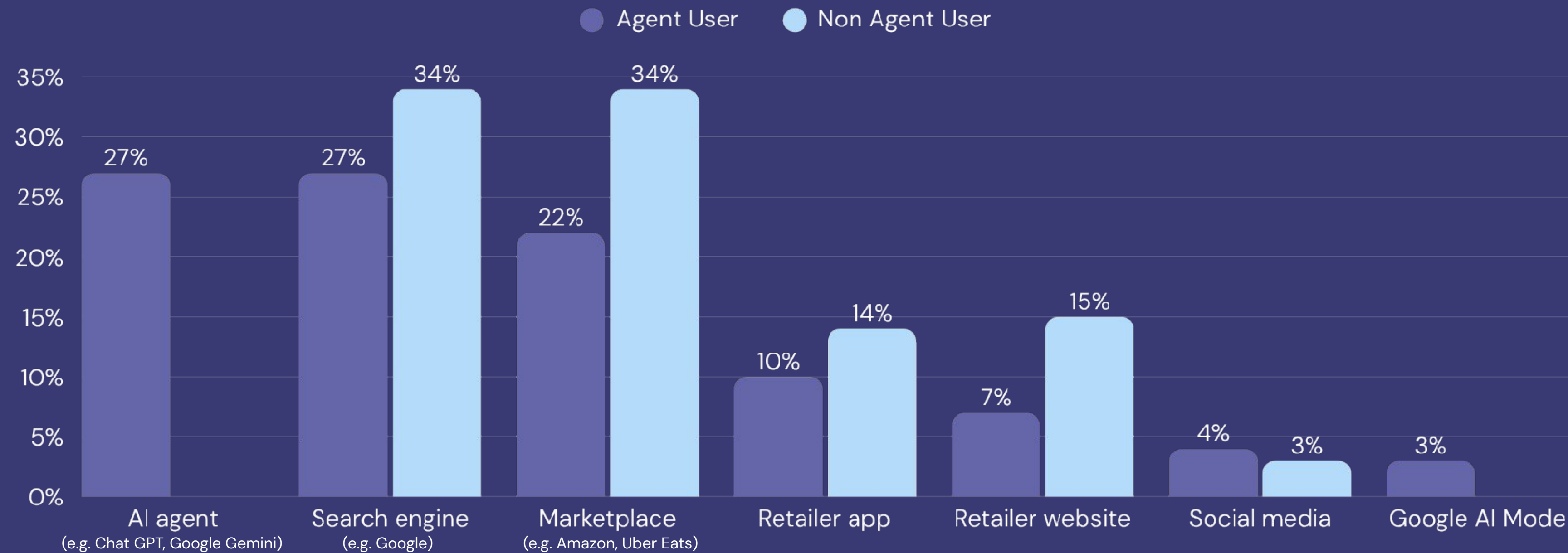
For each of the following categories, please select the digital channel you would most likely go to FIRST:

PERSONAL CARE
(SHAMPOO, BODY WASH, ETC.)



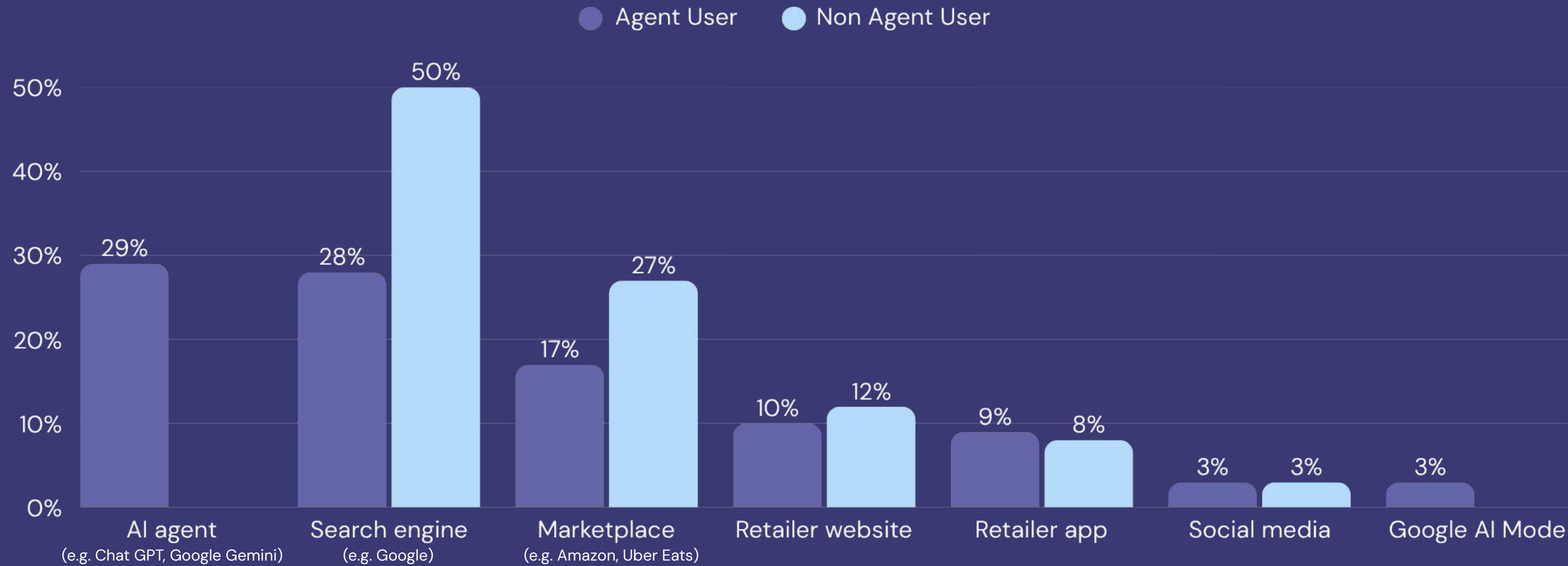
For each of the following categories, please select the digital channel you would most likely go to FIRST:

HOUSEHOLD GOODS
SUCH AS CLEANING PRODUCTS



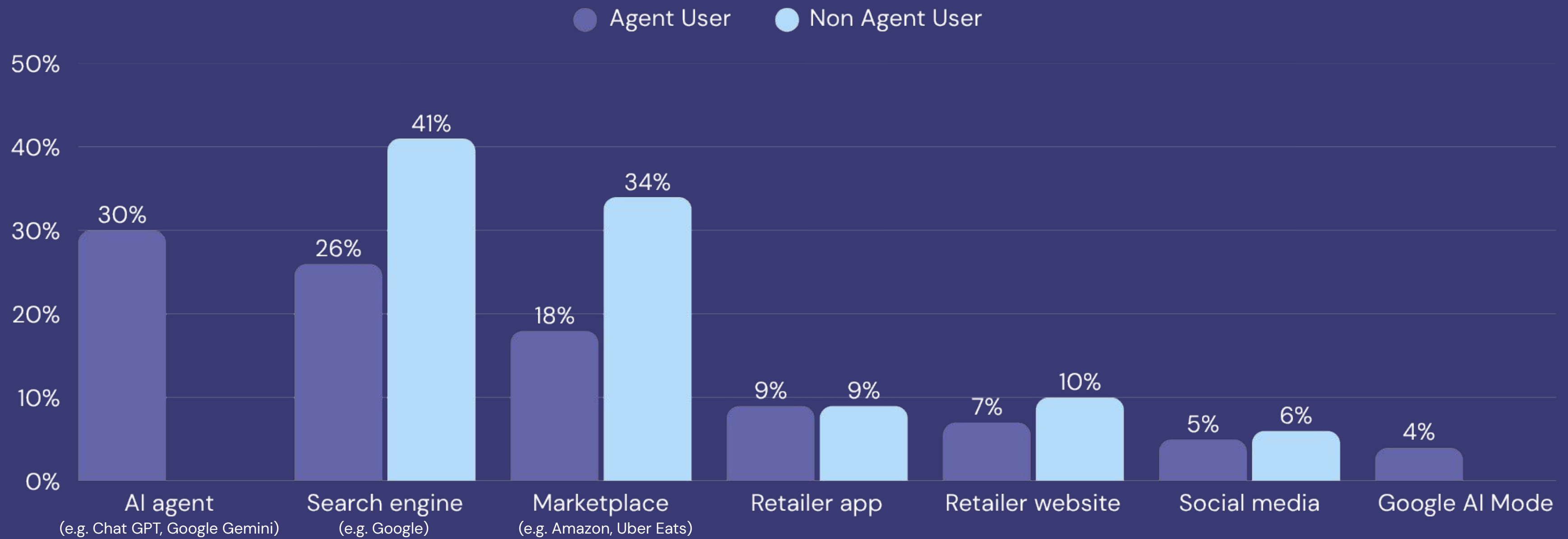
For each of the following categories, please select the digital channel you would most likely go to FIRST:

FURNITURE



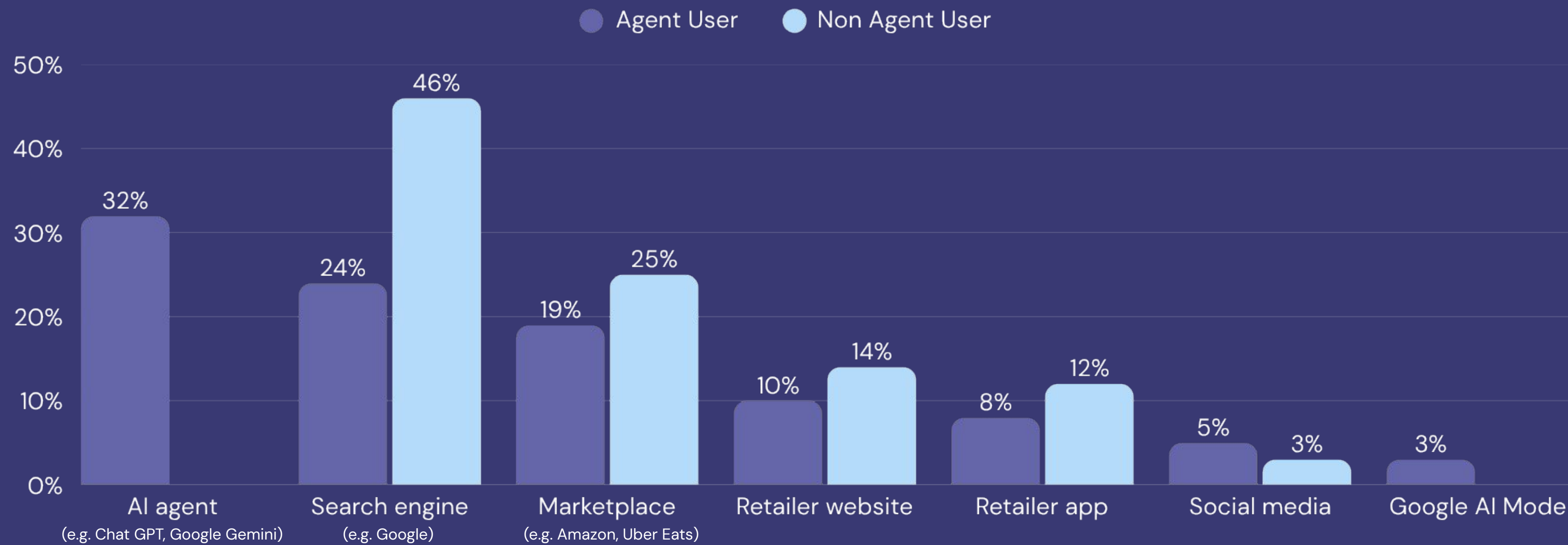
For each of the following categories, please select the digital channel you would most likely go to FIRST:

HOME DECOR



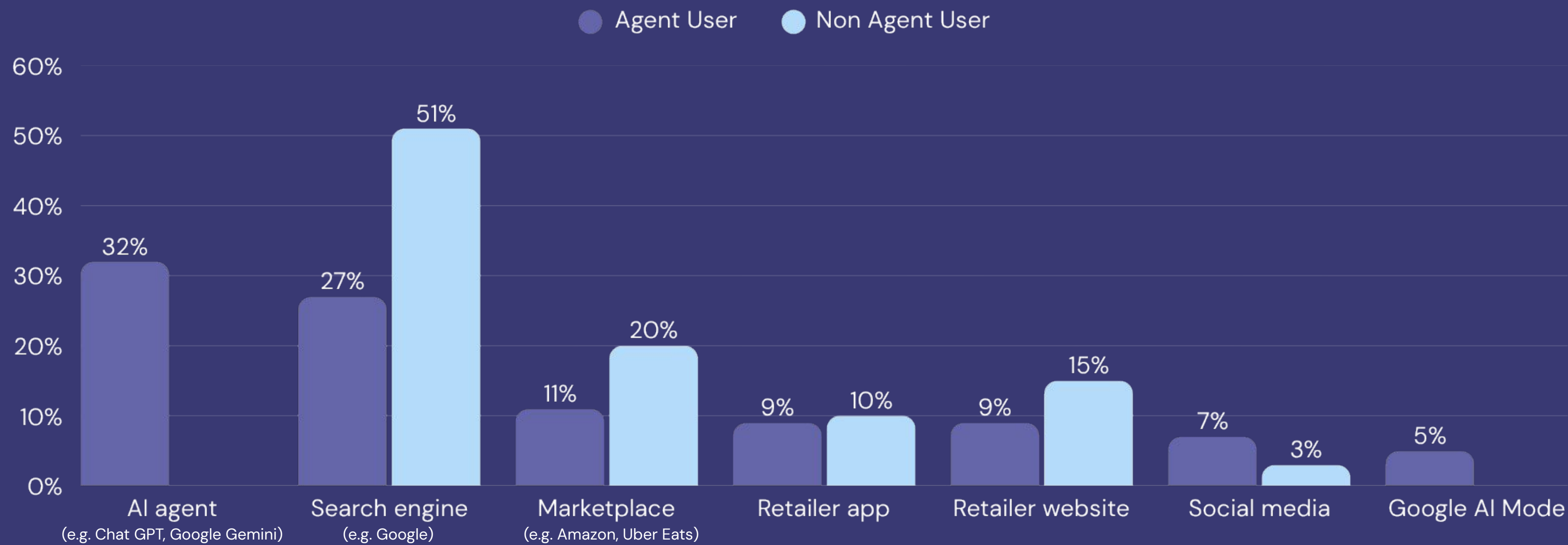
For each of the following categories, please select the digital channel you would most likely go to FIRST:

HOME APPLIANCES



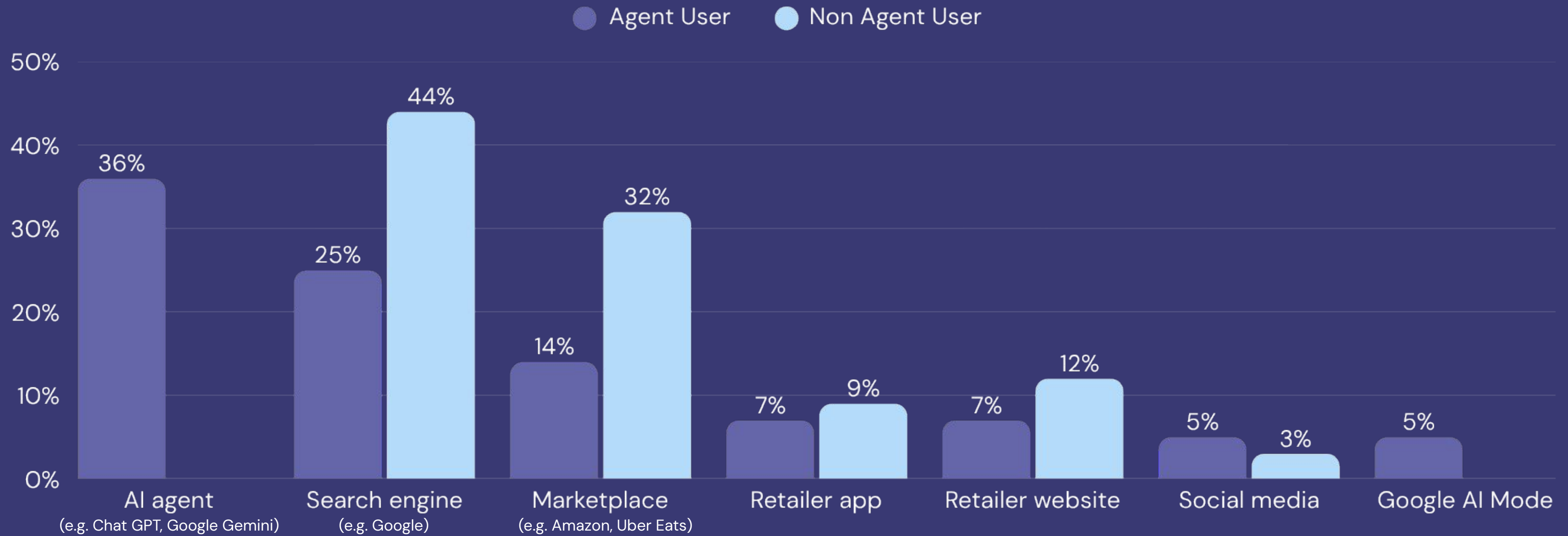
For each of the following categories, please select the digital channel you would most likely go to FIRST:

AUTOMOTIVE



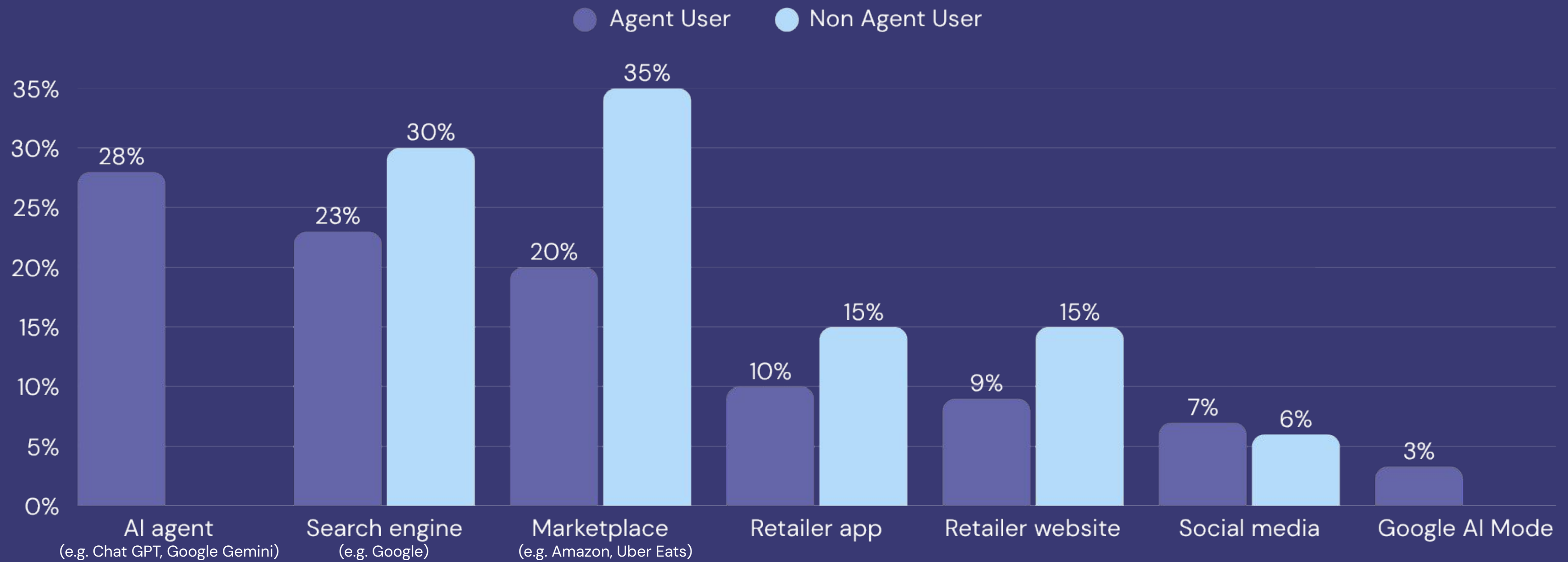
For each of the following categories, please select the digital channel you would most likely go to FIRST:

ELECTRONICS



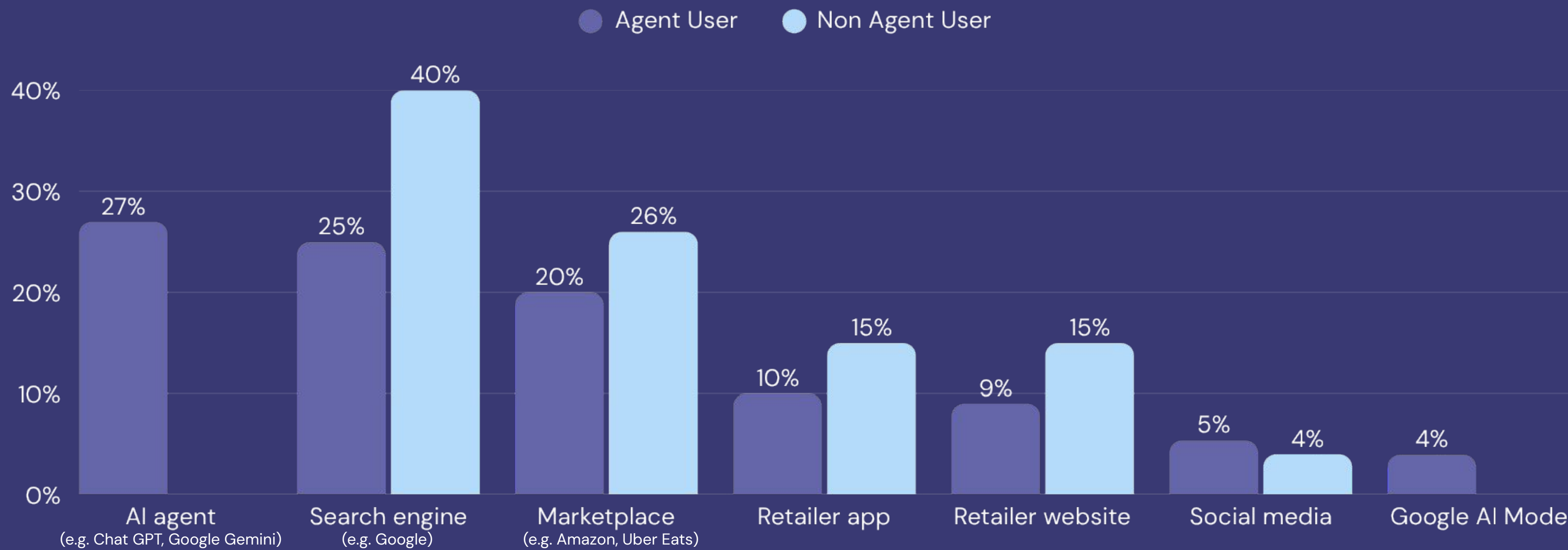
For each of the following categories, please select the digital channel you would most likely go to FIRST:

APPAREL AND ACCESSORIES



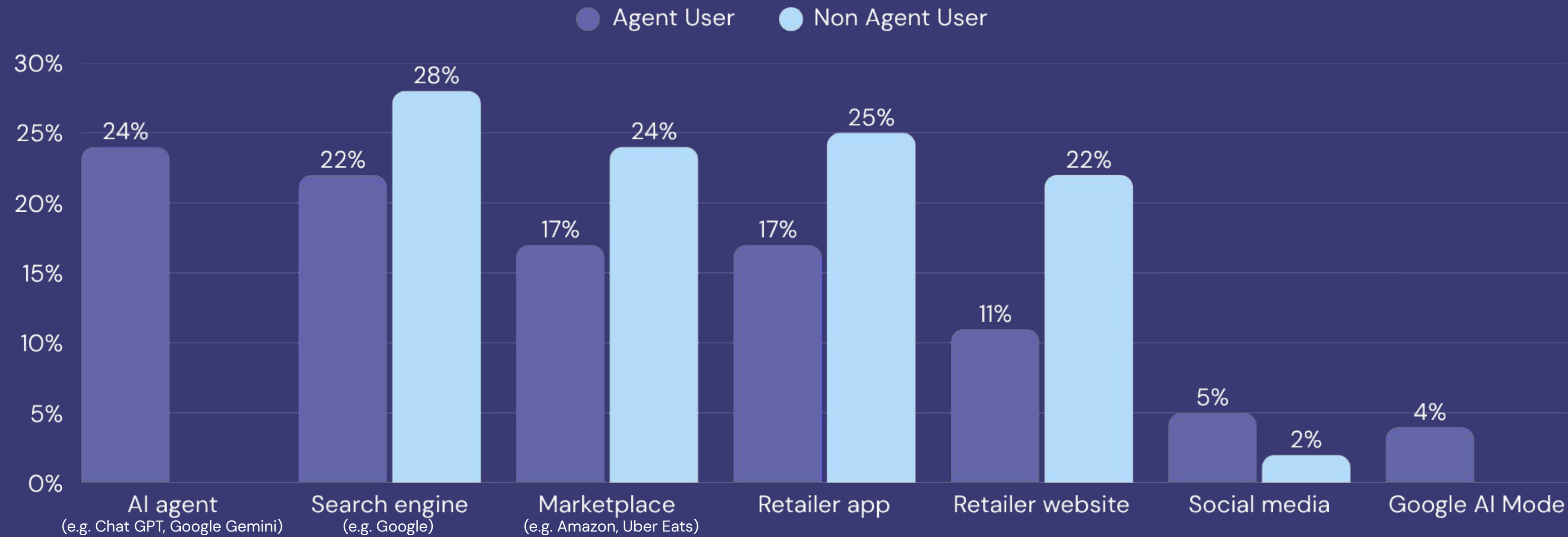
For each of the following categories, please select the digital channel you would most likely go to FIRST:

PET PRODUCTS



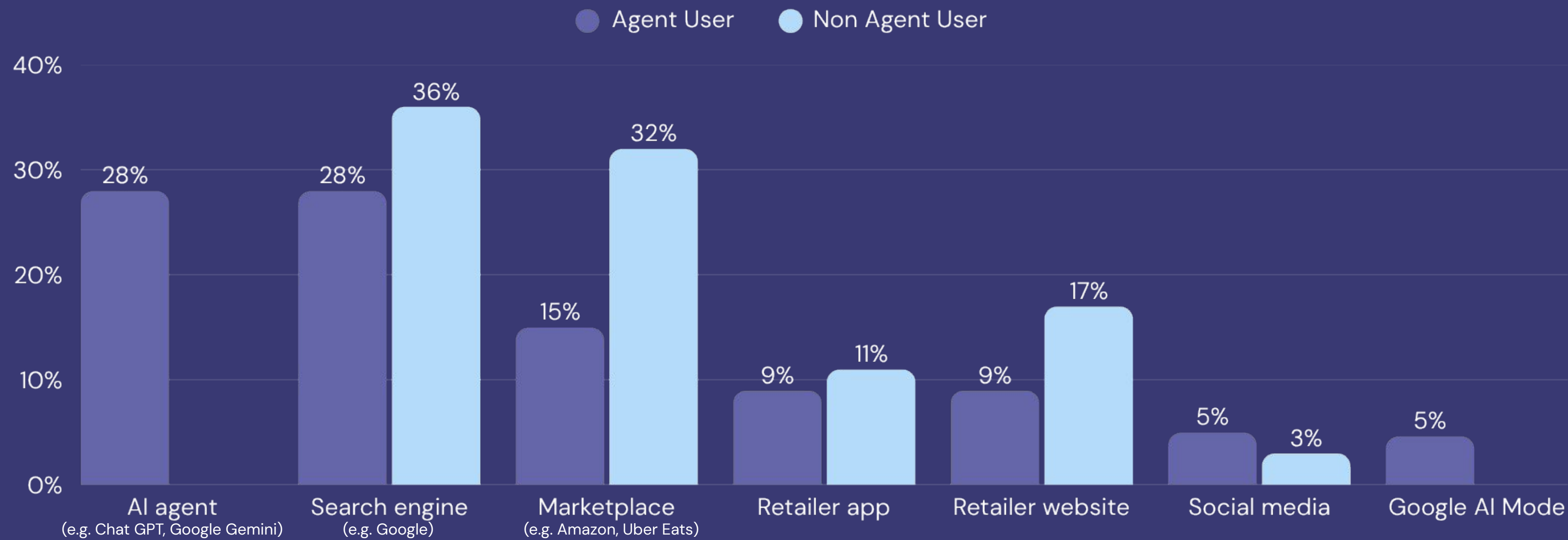
For each of the following categories, please select the digital channel you would most likely go to FIRST:

GROCERIES



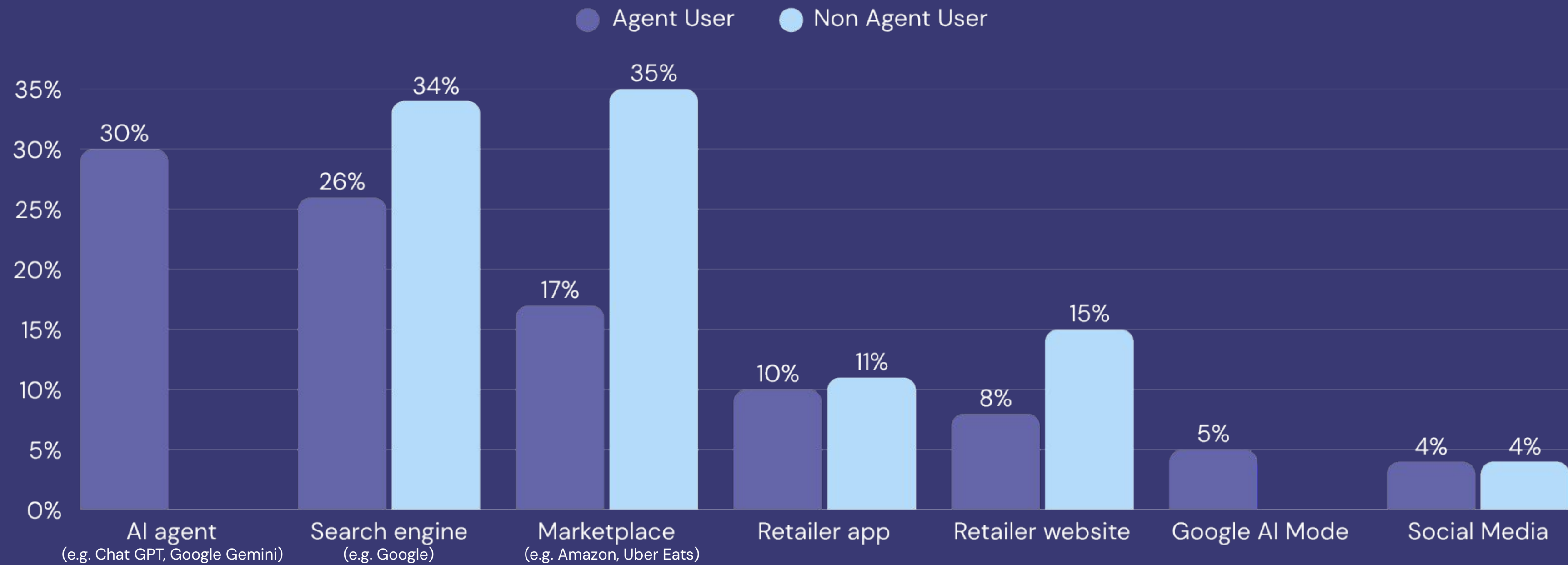
For each of the following categories, please select the digital channel you would most likely go to FIRST:

SPORTING GOODS



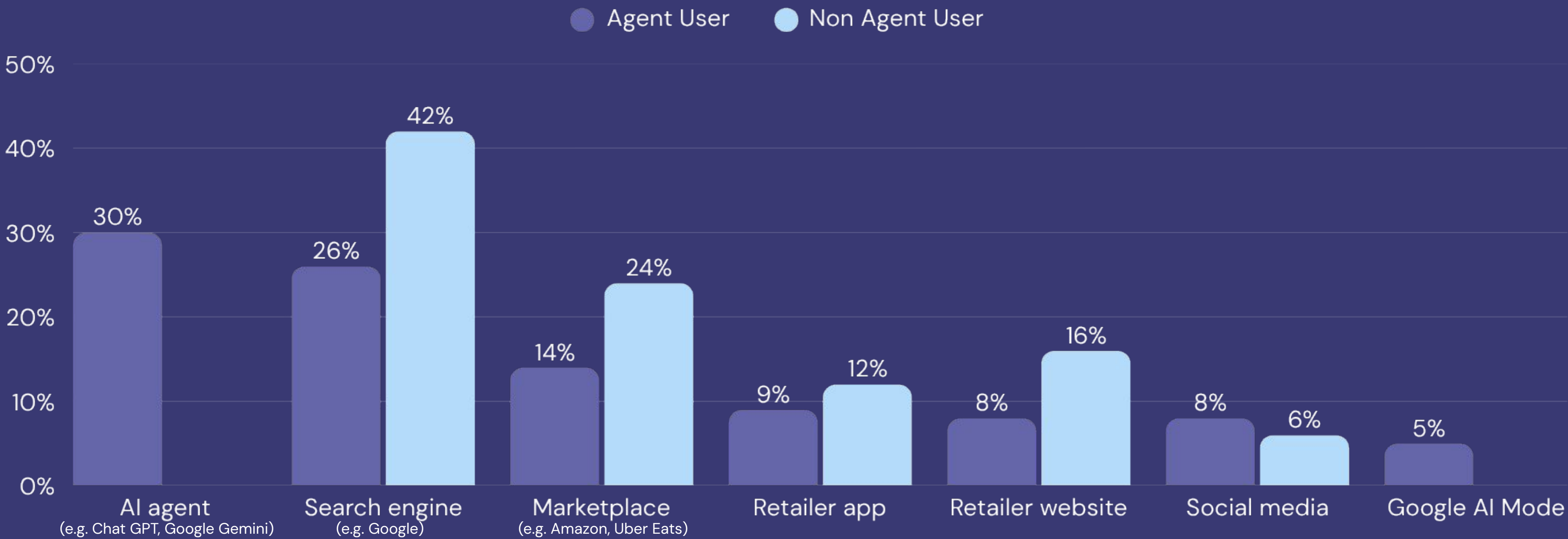
For each of the following categories, please select the digital channel you would most likely go to FIRST:

OFFICE SUPPLIES



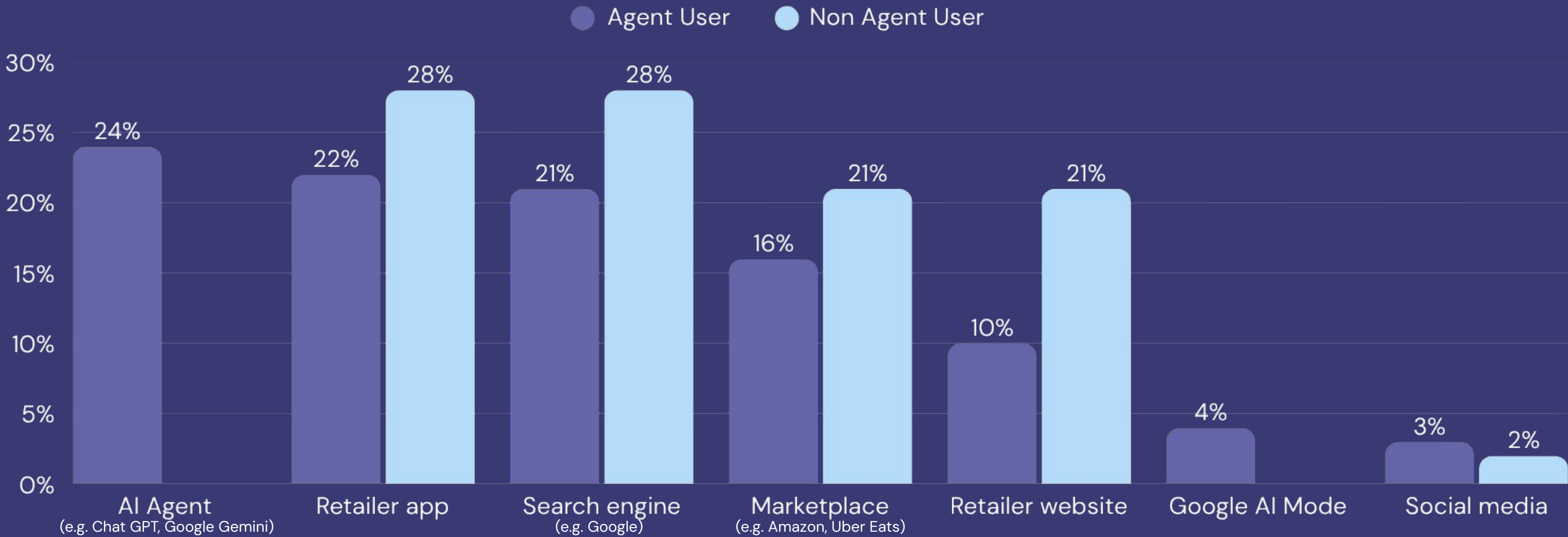
For each of the following categories, please select the digital channel you would most likely go to FIRST:

LUXURY/DESIGNER GOODS



For each of the following categories, please select the digital channel you would most likely go to FIRST:

TAKEOUT/DELIVERY
FOOD/BEVERAGE



THANK YOU.

Reach out for tailored
takeaways and implications
pertaining to your industry



Melissa Minkow

Global Director, Retail
Strategy & Insights

CI&T

ciandt.com