WORLD RETAIL CONGRESS

PARTNER

Vercel

THE AGENT ERA

How 4000 European shoppers are shopping differently

FOREWORD

WORLD RETAIL CONGRESS

Ian McGarrigle
Founder and Chairman, World Retail Congress

“AI agents have become the go-to preference to find detailed answers for the simplest questions to the most complex

When we asked senior retailers from the US, Europe and Asia to list their biggest challenges ahead of the 2026 edition of World Retail Congress in Berlin, 98% of respondents cited fear of their brands failing to be selected by Agentic search engines as their number one issue.

The finding came as a complete surprise to us. Not about the topic of Agentic but the sheer unanimity that the industry is entering a completely new era with a new set of rules.

In everyday life, AI agents have become the go-to preference to find detailed answers for the simplest questions to the most complex. The speed of this adoption is extraordinary and the phrases to "ask ChatGPT" or "Claude" or "Gemini" have already become embedded in language right around the world.

Which does explain the fears that retailers have around what AI agents mean for their brands – or more importantly – how their brands can be become and remain visible to Agentic search.

The World Retail Congress is therefore delighted to be collaborating with Vercel to produce this timely, important and extremely relevant report that has at its core a detailed study of 4,000 European shoppers. This report provides an analysis of their shopping habits, needs and wants in this new digital landscape. And from that, the report provides invaluable pointers and practical ideas for retailers to navigate this fast-moving and evolving world.

Thank you to the team at Vercel for their work and support in producing *The agent era: How 4000 European shoppers are shopping differently*. We hope that it helps you form stronger and closer relationships with your customers.

FOREWORD

Vercel

Malte Ubl
CTO, Vercel

Twenty years ago, nobody could have predicted how Search would rewire the economics and psychology of shopping. I believe we're at the start of that shift again, with agents instead of crawlers.

We commissioned this research with World Retail Congress to find out where European consumers are, not where we assume them to be. Retailer websites and apps remain where most European shoppers start their journey, a 3:1 ratio to those who begin on AI platforms. That minority is growing fast and it's already outpacing every social channel as a discovery source. More than half of AI users across Europe have already bought something on an AI's recommendation, and most of the rest say they'd be willing to. But trust is still fragile, and the quality of AI experiences are already influencing where people shop and how much they spend.

The assumption was that AI agents would behave like the aggregators before them, funneling shoppers through a handful of dominant platforms the way search once funneled everyone through a results page. That's not what we're observing at Vercel. Agents usually go straight to the brand rather than routing through a marketplace listing. If that holds, it's a real reversal of leverage: brands have spent a decade optimising for the aggregator relationship because that's where the traffic lived. Agents rewarding the brand's own site instead suggests brand.com is back, but only for retailers whose site is fast, distinctive, and built to convert humans and agents alike.

Consumers are experimenting with new pathways – nearly a quarter of UK AI users say they want to transact within the AI platform itself - which is exactly why the retailers who invest now in structured product data and in a storefront worth landing on will be the ones positioned to win regardless of which way that settles.

Vercel works with retail and commerce brands like Diageo, Salomon, Frasers Group and Breitling to build both: the high-performing storefront experiences that convert shoppers today, and the AI-powered capabilities that reach the shoppers of tomorrow.

> More than half of AI users across Europe have already bought something on an AI's recommendation

EXECUTIVE SUMMARY

If I look at the last 3 years, even the last few months, things are changing at rapid speed, and I think in the future we'll change faster

David Schneider
Co-founder, Zalando

Artificial intelligence represents the biggest transformation since steam power and will be transformative in ways few have ever seen, Currys outgoing CEO Alex Baldock said to delegates at the 2026 World Retail Congress during his keynote address in April.

He told a packed room of global retail leaders that while ecommerce had not moved on that much over the past 30 years, that AI will "turn this on its head", with agents solving consumer problems in a conversational manner.

It was a theme that echoed through the conference in Berlin. "Customer adoption has been so quick, much quicker than we were expecting. Much faster than the internet," JD Group CEO Régis Schultz told delegates. "I said [to the teams] let's be high risk let's go for it, so it's about changing the mindset. Organic and let it go. The biggest risk is to do nothing."

In the US the company is now receiving orders via ChatGPT and two-thirds are from new customers, with JD Sports also using AI to adapt marketing by country and using it to optimise product inventory.

Zalando co-founder David Schneider also spoke about the German etailer's adoption of AI, explaining that 90% of product marketing is now AI generated. "If I look at the last three years, even the last few months, things are changing at rapid speed, and I think in the future we'll change faster," he said. "Now we can build features with less resources and shorter development times," he said. "Things used to take years."

These were just a few of the active AI case studies that dominated the agenda at the annual conference and demonstrate how AI has moved into the mainstream of retail investment priorities in just a few short years.

THE DAWN OF AGENTIC COMMERCE

For retailers, this presents a new challenge. A world where success hinged on SEO and paid search rankings is on its way out. Consumers are increasingly discovering retailers, brands and products through AI search engines.

This change has the power to democratise retail. But that throws the gauntlet down to retailers - are they ready for an Agentic future and is the infrastructure of their digital channels built for it? And more, where are their customers on their AI adoption journey? What tools are they using and what have those experiences been like? What do they want to use and what should they like those experiences to look like?

Understanding the answers to those questions will help retailers to roadmap their AI strategy.

This World Retail Congress and Vercel report, *The agent era: How 4000 European shoppers are shopping differently*, is based on consumer research with 4,000 shoppers from across the UK, Germany, Southern Europe (Spain, France, Italy), and the Nordics (Sweden, Norway, Finland, Denmark) and is designed to answer those questions.

AI IS CHANGING DISCOVERY FASTER THAN PURCHASE

The most immediate impact of AI is being felt at the top of the purchasing funnel. While retailer websites, apps and Google remain the dominant starting points for shopping journeys, AI-powered search platforms such as ChatGPT, Google Gemini and Claude are already influencing how consumers discover products and brands.

In some markets, more than one-quarter of consumers now begin shopping journeys through AI-powered discovery, while a growing proportion are using these platforms to compare prices, evaluate products and seek purchasing advice.

> **Customer adoption has been so quick, much quicker than we were expecting. Much faster than the internet**
>
> **Régis Schultz,** CEO, JD Group

Importantly, consumers are increasingly acting on those recommendations. More than half of AI users across all four regions have already purchased products based on AI-generated suggestions, while many more say they would be willing to do so in future.

This represents a significant shift in retail discovery, which will become increasingly about optimising retail websites and contents to be easily readable by AI agents.

As AI platforms move towards agentic commerce and direct purchasing capabilities, visibility within AI ecosystems will become an increasingly important determinant of commercial success.

TRUST WILL DETERMINE THE WINNERS

Consumers are generally positive about AI-powered recommendations, personalised experiences and intelligent shopping tools. However, enthusiasm is not unconditional.

Across Europe, consumers continue to express concerns around privacy, transparency and the potential loss of human interaction. Many worry about the accuracy of recommendations, how their data is being used and whether AI systems are really showing them the products best suited to their needs.

These concerns are particularly important because the research shows that consumers do not want fully automated

RETAILER WEBSITES AND STORES REMAIN CENTRAL

Despite growing AI adoption, retailer-owned channels remain the foundation of European retail. Across every region, retailer websites are still the most common starting point for shopping journeys. Consumers continue to trust retailer websites as the primary destination for product information, evaluation and purchase.

At the same time, the research highlights the continued importance of physical stores. Even among highly digital consumers, stores remain central to high-value purchasing decisions, with many shoppers preferring to see products in person before committing to purchase. This reinforces the point that AI is not replacing existing channels. It is simply better connecting them.

retail experiences. Instead, most prefer a combination of AI-powered assistance and human expertise.

This demonstrates that the retailers that succeed with AI will not necessarily be those that automate the most. They will be those that build the greatest confidence in how AI is being used.

ELEVATE EXPERIENCES, NOT NECESSARILY TECH BUDGETS

One of the clearest messages from consumers is that they are not looking for AI for its own sake.

Across every market, consumers show the strongest interest in practical applications that make shopping easier and more effective. Personalised recommendations, smarter virtual assistants, visual search and review summaries all outperform more experimental technologies.

Even where newer technologies such as virtual try-on, augmented reality and voice commerce generate interest, consumers consistently prioritise usefulness over novelty.

This has important implications for investment decisions. The most valuable AI initiatives are likely to be those that remove friction, reduce decision fatigue and help consumers make more confident purchasing decisions.

THE FUTURE BELONGS TO RETAILERS THAT ARE AI-READY

The research suggests that AI is evolving from an emerging capability into a competitive differentiator.

Consumers increasingly expect retailers to deliver personalised experiences, intelligent assistance and seamless shopping journeys. In some markets, particularly Southern Europe, AI capabilities are already influencing where consumers choose to shop and how much they are willing to spend.

Before retailers deploy these tools they need to invest in stronger data foundations, richer product information and digital infrastructures capable of supporting both human shoppers and AI agents.

Product specifications, pricing, promotions, stock availability, imagery, reviews and contextual content will all play a growing role in determining how products are surfaced, recommended and ultimately purchased. Consistency and accuracy will become increasingly important as AI systems rely on this information to guide consumer decisions.

WHAT COMES NEXT

The findings of this study point towards a future in which AI continues to become embedded throughout every stage of the shopping journey.

Consumers are already using AI to discover products, compare alternatives and evaluate purchases. They are increasingly engaging with AI-powered experiences on retailer websites and are beginning to articulate what they want from the next generation of digital commerce.

Yet the future will not be defined by AI alone. Consumers continue to value human expertise, trusted brands and physical retail environments. The opportunity for retailers is therefore not to replace existing experiences, but to enhance them.

"For most of the web's history, we optimized storefronts for two audiences: people and Google. There's now a third: AI agents that discover, compare, and increasingly recommend products on a shopper's behalf," advises Malte Ubl, Chief Technology Officer at Vercel.

He adds: "The retailers who win the next decade will be the ones who can iterate and ship quickly enough to keep up with how fast this consumer behaviour is moving."

The next era of retail will belong to organisations that combine intelligent technology with trusted customer experiences, creating journeys that are more personalised, more efficient and more helpful, while remaining fundamentally human.

SURVEY SNAPSHOT

Six stats that herald the age of agentic commerce

METHODOLOGY

World Retail Congress surveyed 4,000 European consumers during May 2026. This included 1,350 UK consumers, 825 Southern European consumers, 1,000 German consumers, and 825 Nordic consumers.

27%

of Southern European consumers already start their shopping journeys on AI-powered search engines.

The figure is 24% in Germany, 20% in the UK, and 19% in the Nordics.

53%

of European AI users head to AI-powered search engines to compare prices.

That includes 55% in Southern Europe, 54% in the Nordics, 53% in Germany, and 51% in the UK.

58%

of Southern Europeans have purchased a product based on an AI recommendation.

The figure is 55% of UK and German consumers, and 51% in the Nordics.

24%

of UK consumers want to be able to buy products within AI-powered search engines.

That compares with 22% of Nordic consumers, 21% of Southern Europeans, and 18% of Germans.

59%

of Southern European consumers would choose one retailer over another because it has better use of AI tools on its website.

The figure is 43% of UK consumers, 40% of Germans, and 39% of Nordics.

28%

of German consumers say they would spend more with their chosen retailer if they have the latest AI features to guide them.

37% of Southern Europeans, 31% in the UK, and 26% of Nordic shoppers would too.

CHAPTER 1

WHERE EUROPEAN CONSUMERS ARE: A MARKET-BY-MARKET BASELINE

European retail is entering a new competitive era where AI is reshaping the shopping experience, from how consumers discover brands and products, through to deciding what to buy, and how they navigate between digital and physical channels.

Yet while AI adoption is accelerating, consumer behaviour remains far from uniform across the continent.

This World Retail Congress and Vercel research shows that Europe is definitely not a single ecommerce market. The UK, Germany, Southern Europe and the Nordics are all at different stages of digital maturity, with different consumer behaviours, different growth opportunities and, crucially, different priorities for AI and digital investment.

Understanding these differences is strategically critical - competitive advantage will be about investing in the capabilities that matter most within each market.

DIFFERENT MARKETS, DIFFERENT DIGITAL INVESTMENTS

The UK remains Europe's most digitally mature retail market. By comparison, ecommerce accounted for 13.5% of retail sales in Germany during 2025 [data from Handlesverband Deutschland], 14% in Sweden [data from Swedish E-com Association], 10% in Norway [data from Statistics Norway] and 11.5% in Italy [data from Netcomm - School of Management of Politecnico di Milano].

In the UK, the Office for National Statistics reported that ecommerce represented 27.6% of total retail sales in May 2026 – up from 26.1% in May 2025 and well above the 19.1% recorded immediately before the pandemic.

When asked how much of their monthly spend is online, UK consumers report an even higher average of 38.3%, significantly ahead of Germany (30.9%), Southern Europe (27.7%) and the Nordics (29.5%).

The UK's preeminent position becomes even clearer when consumers compare their shopping behaviour with three

WHAT PROPORTION OF YOUR MONTHLY SPEND WITH RETAILERS IS DONE ONLINE?
(compared to the amount you spend in physical shops)

UNITED KINGDOM
38%

SOUTHERN EUROPE
28%

GERMANY
31%

NORDICS
29%

years ago. Nearly half (48%) of UK shoppers say they spend more online today than they did three years ago, compared with 42% in Southern Europe, 38% in Germany and 37% in the Nordics.

In the Nordics, the growth of ecommerce appears to have plateaued, according to the consumers we surveyed. Almost half (46%) of say their online spending has remained unchanged over the past three years - the highest proportion of any region surveyed. However, this doesn't mean retailers should deprioritise the Nordics. Rather than indicating weak digital adoption, this just suggests the Nordic ecommerce market has reached a mature phase and further growth in online spending is naturally slowing.

This does, however, mean investment strategy should vary by market.

In growth markets such as the UK, increasing online sales means that there are more customers and spend to be won, so investments in visibility via search and advertising are key.

In the Nordics, however, the challenge is more nuanced. While visibility will remain important, retailers are less likely to drive significant growth by acquiring new customers online. Instead, retailers need to focus on delivering better digital experiences for existing online shoppers. This means improving personalisation, reducing friction in the shopping journey, strengthening AI-powered product discovery and better connection the online experience with stores. Richer experiences will drive loyalty and, in turn, revenue.

RETAILER WEBSITES DOMINATE, BUT AI IS GAINING GROUND

Across all four regions, consumers say they prefer to start their shopping journey on retailer websites. Four in five Nordic consumers (80%) start there, followed by 79% in the UK, 77% in Southern Europe and 76% in Germany. Retail apps also remain highly influential, particularly in Germany where 73% of consumers begin their journey there, compared with 68% in both the UK and Southern Europe and 62% in the Nordics. The popularity of retailer-owned digital spaces is advantageous in that it offers retailers greater control, but also presents its own challenges, which we explore in greater detail in chapter 3.

Google continues to play a significant role in product discovery across every market. However, AI-powered search is quickly gaining traction.

More than one quarter (27%) of Southern European consumers now begin shopping journeys on AI platforms such as ChatGPT, Claude or Google Gemini. Adoption has already reached 24% in Germany, 20% in the UK and 19% in the Nordics. This places AI-powered discovery ahead of all social channels – something we cover more in chapter 2.

Commercially, this means retailers should already be thinking about how their products, content and brand information are surfaced within AI platforms, not just within traditional search engines.

Consumers say they prefer to start their shopping journey on retailer websites

WHEN SHOPPING ONLINE, WHERE DOES YOUR DIGITAL SHOPPING JOURNEY START?

	COUNTRY			
	UK	SOUTHERN EUROPE	GERMANY	NORDICS
I go direct to a retailer's website	79%	77%	76%	80%
I go direct to a retailer's app	68%	68%	73%	62%
Google	65%	66%	67%	68%
AI search (i.e., ChatGPT, Claude, Google Gemini)	20%	27%	24%	19%
Social media – Facebook	19%	15%	14%	23%
Social media – TikTok	18%	16%	15%	13%
Social media – Instagram	14%	16%	14%	16%
Social media – Snap chat	6%	5%	4%	8%
Social media – Pinterest	5%	4%	6%	4%
Social media – X (formerly Twitter)	5%	3%	4%	4%
Social media – Other (please specify)	1%	3%	3%	2%

HOW EUROPEANS USE SOCIAL

European consumers are also using social platforms differently.

Nordics consumers are the biggest users of Facebook as a shopping discovery channel, with 23% of consumers beginning journeys there. That compares with 19% in the UK, 15% in Southern Europe and 14% in Germany.

The UK is Europe's strongest TikTok market, where 18% of consumers begin shopping journeys, compared with 16% in Southern Europe, 15% in Germany and 13% in the Nordics.

European consumers are relatively consistent in their use of Instagram, with the platform used by 16% in both Southern Europe and the Nordics and 14% in both the UK and Germany.

These differences reinforce an important lesson for retailers expanding across Europe. Customer acquisition strategies cannot simply be replicated across markets.

COMPARED TO THREE YEARS AGO (2023) DO YOU SPEND MORE, THE SAME, OR LESS ON RETAIL WEBSITES? (compared to the amount you spend in physical shops)

	COUNTRY			
	UK	SOUTHERN EUROPE	GERMANY	NORDICS
I spend more online than I did three years ago	48%	42%	38%	37%
I spend about the same amount I did online three years ago	39%	42%	44%	46%
I spend less online than I did three years ago	13%	17%	18%	17%

AI STRENGTHENS OMNICHANNEL SHOPPING

Around one third of consumers across all four regions still discover and complete the majority of their shopping entirely in-store. This is the dominant behaviour for 33% of German consumers, 32% in both Southern Europe and the Nordics, and 29% in the UK.

However, outside of those cohorts one of the clearest findings from this research is that consumers across Europe glide between channels every time they search, discover and buy.

UK consumers are most likely to discover products in-store before completing their purchase on a retailer's website (31%), for example.

AI is also now embedded into the shopping journeys of one-in-ten or more across Europe – 13% in Southern Europe and Germany, 12% in the UK and 10% in the Nordics discover products through AI-powered search before completing purchases on retailer websites.

AI is also influencing purchases that later happen in-store. Small numbers currently, but with the potential to grow – 5% of German consumers, 4% of Southern Europeans and Nordics shoppers, and 3% in the UK discover products through AI before visiting a physical store to buy them.

The research findings around Nordic consumers is particularly interesting. The growth of ecommerce may have plateaued in the region, but Nordic consumers are the most likely to discover new products or brands online before then completing the purchase in a shop – 28% versus 25% in the UK, 22% in Germany, and 20% in Southern Europe.

HIGH-VALUE PURCHASES HAPPEN IN STORES

Indeed, stores are a vital asset for retailers – particularly those in the luxury sphere. They represent brand worlds for consumers to step into, with highly trained colleagues who

WHICH OF THE FOLLOWING STATEMENTS ACCURATELY DESCRIBES YOUR SHOPPING BEHAVIOUR THE MAJORITY OF THE TIME?

	COUNTRY			
	UK	SOUTHERN EUROPE	GERMANY	NORDICS
I discover new products or brands in physical shops and normally purchase them in the physical shop	29%	32%	33%	32%
I discover new products or brands in physical shops but normally complete the purchase online on a retailer's website or app	31%	31%	28%	25%
I discover new products or brands online on retailers' websites and then visit a physical shop to complete the purchase	25%	20%	22%	28%
I discover new products or brands online on an AI-search engine such as ChatGPT and then follow the links to a retailer's website to complete the purchase	12%	13%	13%	10%
I discover new products or brands online on an AI-search engine such as ChatGPT and then visit a physical shop to complete the purchase	3%	4%	5%	4%

WHEN IT COMES TO HIGH-VALUE (EXPENSIVE) PURCHASES ARE YOU MORE LIKELY TO PURCHASE IN A PHYSICAL SHOP OR ONLINE?

	COUNTRY			
	UK	SOUTHERN EUROPE	GERMANY	NORDICS
In a physical shop	65%	79%	61%	76%
On a retailer's website	35%	21%	39%	24%

can story tell and provide the reassurance customers need to part with their cash.

This is reflected in the research - across every region, the majority of consumers prefer to buy high-value products in shops rather than online. This is particularly the case in Southern Europe, where 79% head into stores for expensive purchases, followed by the Nordics (76%), the UK (65%) and Germany (61%).

This further illustrates the important relationship between AI and store environments. AI is increasingly influencing the top of the funnel – particularly in search – but acts as another footfall driver into stores. A customer might discover a luxury item through AI powered search, follow the recommendation links through to a retailer's website, used AI-powered tools on-site such as virtual try-on or assistance, and then headed into the store to complete the purchase.

Going forward, the most successful luxury retailers will be those that connect every touchpoint in the customer journey - with well-managed content supported by robust data and back-end systems in order to be successfully surfaced within AI-powered discovery, followed by seamless in-store experiences delivered by highly trained store colleagues.

WHAT THIS MEANS FOR YOU

This chapter shows that the wheels of change are in motion in European retail, with AI becoming an important part of the complex web of customer shopping journeys, albeit at varying speeds across different markets.

Retailers must approach Europe not as a single whole, but with different commercial strategies for each country.

As we've discussed, the UK represents the biggest growth opportunity in terms of ecommerce, with online continuing to represent a greater share of total retail sales. The focus there should therefore be on both winning new customers and gaining market share from competitors with better online experiences. While in the Nordics, where online growth has reached a mature phase, investments should be largely targeted at creating seamless and enjoyable brand experiences online, in order to drive more spend out of existing customers and to lure shoppers from competitors.

The consistent message, however, is that the retailers that succeed over the coming years will be those that integrate AI into a seamless end-to-end customer journey - connecting discovery, digital merchandising, ecommerce and stores into a single, consistent customer experience.

CHAPTER 2
HOW AI IS RESHAPING DISCOVERY

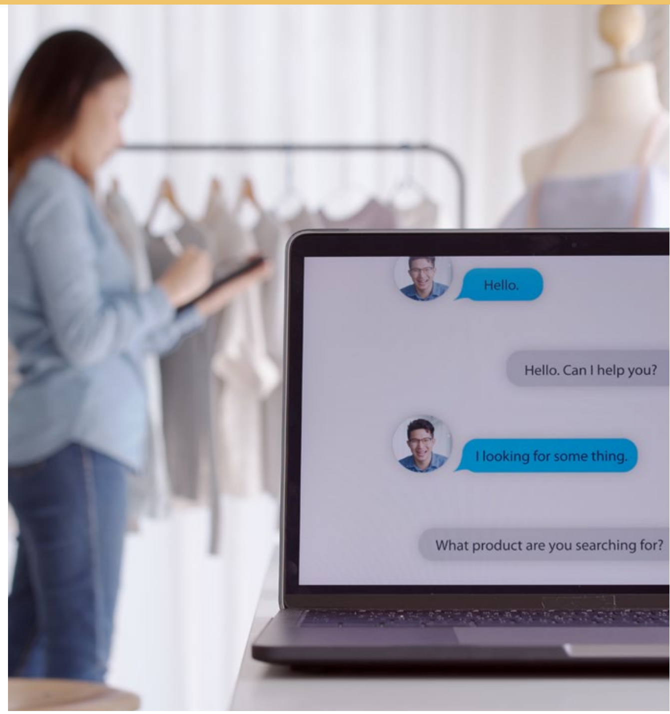
AI search engines have overtaken TikTok, Instagram and Facebook as a shopping discovery channel across Europe, with profound implications for retail.

That is perhaps one of the most significant findings in this research. In less than four years (ChatGPT launched in 2022), AI has evolved from being an emerging technology discussed at conferences but only used by a few of the largest global retailers, to becoming a mainstream source of product discovery. The result is that it has fundamentally changed how consumers discover brands, compare products and make purchasing decisions.

While retailer websites, apps and Google remain the dominant discovery channels across Europe, the fact that AI-powered discovery has overtaken all social platforms is remarkable when you consider that TikTok (launched 2016), Instagram (launched 2010) and Facebook (launched 2004) have spent years becoming embedded in consumers' daily lives as shopping and discovery channels.

That's not to say that social channels are not important – the findings in Chapter 1 show they still factor heavily into consumer shopping journeys – but AI-powered discovery represents a whole new phase of retail; one where AI acts as an intermediary between the shopper and the retailer.

ChatGPT is the clear market leader. Nearly half (49%) of Southern European consumers who use AI-powered search say they use ChatGPT when researching products, making it the most AI-engaged region in the study. Adoption is also



WHEN SHOPPING FOR NEW PRODUCTS, DO YOU USE ANY OF THE FOLLOWING AI-POWERED SEARCH ENGINES?

	COUNTRY			
	UK	SOUTHERN EUROPE	GERMANY	NORDICS
ChatGPT	33%	49%	38%	40%
Google Gemini	27%	37%	30%	22%
Claude	5%	6%	6%	5%
Microsoft Bing AI	6%	4%	4%	4%
Perplexity AI	4%	5%	3%	3%
Something else – please specify	1%	1%	2%	2%
None of the above	50%	32%	40%	44%

WHEN YOU USE THESE AI-POWERED SEARCH ENGINES, WHAT ARE YOU USING THEM TO DO?

	COUNTRY			
	UK	SOUTHERN EUROPE	GERMANY	NORDICS
To compare prices	51%	55%	53%	54%
For advice on what to buy and the product's features	43%	53%	38%	46%
Discover new brands or products	42%	31%	33%	34%
To find products from brands I already shop with	30%	22%	27%	26%
I want to be able to buy the product within the AI-powered search engine without being redirected to the retailer's website	24%	21%	18%	22%
Something else – please specify	1%	1%	2%	1%

substantial in the Nordics (40%) and Germany (38%), while the UK currently stands at 33%.

The data shows that Google Gemini has established itself as the second most dominant platform. Southern Europe again leads adoption at 37%, followed by Germany (30%), the UK (27%) and the Nordics (22%).

Beyond these two leading platforms, the market is fragmented. Claude is used by around 5-6% of consumers across every region, while Microsoft Bing AI and Perplexity AI currently attract fewer than 6% of shoppers in each market.

FROM DISCOVERY TO DECISIONS

Consumers continue to be price-driven in their shopping behaviour – price comparison is the most common use of AI-powered discovery across every market. That includes 55% in Southern Europe, 54% in the Nordics, 53% in Germany and 51% in the UK.

This reveals the intent behind usage. Consumers are not just asking questions, they want information to help them make firm decisions. AI is becoming a trusted advisor and influencing shopping decisions before consumers even reach a retail website.

This role is further evidenced in the research. More than half (53%) of Southern European AI users use these platforms for advice on what to buy and to get a better understanding of product features. This compares with 46% in the Nordics, 43% in the UK and 38% in Germany.

Meanwhile, UK consumers are more likely to use AI to discover new brands and products, with 42% doing so compared with 34% in the Nordics, 33% in Germany and 31% in Southern Europe.

These findings illustrate the varied roles AI-powered discovery is playing across the countries and regions we surveyed. In the UK, AI is increasingly introducing consumers to new brands and products. In Southern Europe, consumers are using AI more fully, to evaluate options, compare products and build confidence before buying.

It is critical that retail websites are easily readable by AI agents, in order that they show up in the small number of recommendations these systems make.

In the era of search-engine dominance, a retailer that didn't show up on the first page of Google could still be found through further searching, advertising, or marketplaces. Whereas, if growing numbers of consumers use AI-powered discovery they will be increasingly likely to only consider the brands and products they are presented with by those platforms.

CONSUMERS TRUST AI RECOMMENDATIONS

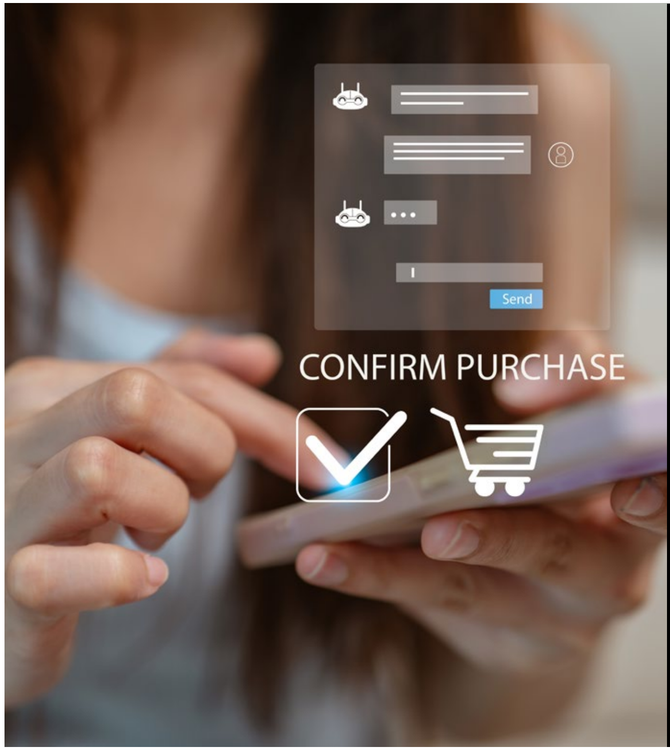
The research suggests that trust has already been established – crucial to the long-term success of AI-powered discovery.

Across every market, more than eight in ten consumers that use AI describe AI-generated shopping recommendations as either 'very helpful' or 'sometimes helpful'. The UK and Southern Europe lead the way, with 87% expressing positive views, followed closely by Germany at 84% and the Nordics at 82%.

In the UK consumers are the most trusting of AI recommendations, with 32% describing them as 'very helpful'. This puts the UK narrowly ahead of Germany (31%), with Southern Europe at 26% and the Nordics at 20%.

For retailers, this represents an important tipping point. With growing numbers of consumers feeling AI-powered recommendations are accurate, they now have the confidence to incorporate AI into everyday shopping decisions.

It is little surprise, then, that more than half of AI users across every region report having already bought a product based on an AI recommendation. Southern Europe again leads adoption, with 58% saying they have purchased following an



Across every market, more than eight in ten consumers that use AI describe AI-generated shopping recommendations as either 'very helpful' or 'sometimes helpful'

HOW HELPFUL DO YOU FIND AI-POWERED PRODUCT RECOMMENDATIONS USING THESE SEARCH ENGINES?

	COUNTRY			
	UK	SOUTHERN EUROPE	GERMANY	NORDICS
Unhelpful	4%	3%	4%	5%
Not very helpful	9%	10%	12%	13%
Sometimes helpful	55%	62%	53%	62%
Very helpful	32%	26%	31%	20%
NET: Unhelpful / Not very helpful	13%	13%	16%	18%
NET: Very / Sometimes helpful	87%	87%	84%	82%

AI recommendation, while both the UK and Germany come in at 55%, with the Nordics close behind at 51%.

Significantly, among consumers who have not yet purchased based on an AI recommendation, many say they are willing to do so in future. Twenty-four percent of Nordic AI users are open to purchasing based on AI recommendations, alongside 22% in the UK, 18% in Southern Europe and 17% in Germany.

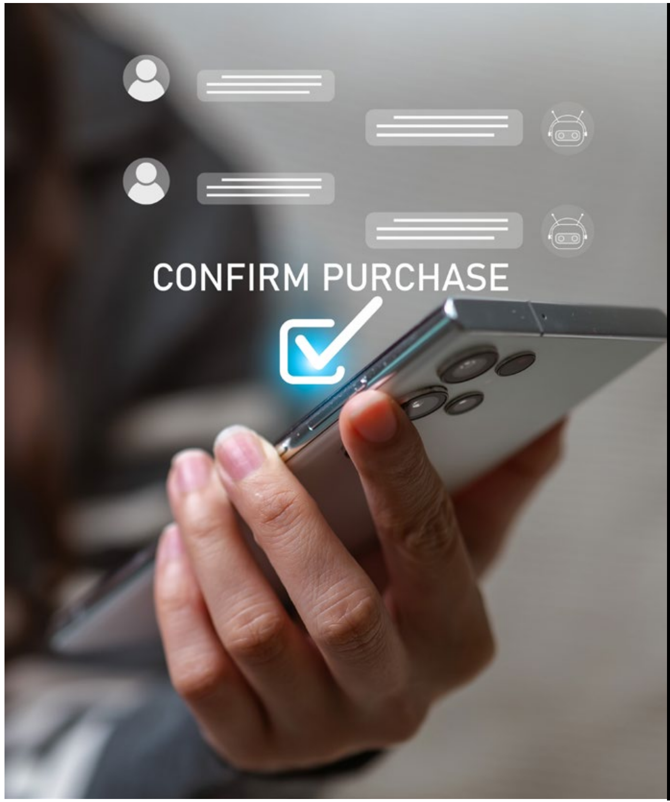
This means between three quarters and four fifths of AI users across Europe have either already acted on AI recommendations or are willing to do so. This is a rapid shift for a technology that launched less than four years ago.

A PLACE TO DISCOVER… AND BUY

The research also provides an early indication of where AI-powered commerce is heading next.

Nearly one quarter (24%) of UK AI users say they would like to purchase products directly within AI-powered search engines rather than being redirected to a retailer's website. Similar levels are seen in the Nordics (22%) and Southern Europe (21%), with Germany slightly behind at 18%.

Although Agentic commerce remains at an early stage, these figures are significant. Consumers are already demonstrating a willingness to allow AI not only to recommend products, but increasingly to facilitate transactions as well.



Nearly one quarter (24%) of UK AI users say they would like to purchase products directly within AI-powered search engines rather than being redirected to a retailer's website

The AI platform operators themselves have been investing across the past 18 months to turn them from places consumers use to discover brands and products, to become spaces in which they can transact.

In November 2024, Perplexity launched dedicated shopping capabilities in the US, allowing users to receive product recommendations and move directly towards purchase. In April 2025, OpenAI introduced shopping within ChatGPT Search, enabling consumers to compare products, review recommendations and access retailer information through natural conversations. One month later, Google unveiled AI-powered shopping experiences within AI Mode, combining Gemini's reasoning capabilities with Google's Shopping Graph - which now contains more than 50 billion product listings - to create conversational shopping journeys.

In September 2025, OpenAI took a further step towards agentic commerce by enabling ChatGPT users in the US to purchase directly from Etsy sellers. Shopify followed in March 2026 by announcing Agentic Storefronts, allowing merchants to sell products directly through ChatGPT, Microsoft Copilot, Google AI Mode and Gemini while retaining control of pricing, branding, checkout and customer data.

NOW IS THE TIME TO ACT

Increasingly, AI platforms are going to become places where discovery, comparison and purchasing happen in one place.

As it stands though, although AI usage is growing rapidly, adoption is not yet universal. Half of UK consumers (50%) say they do not currently use any of the AI-powered search platforms when shopping, compared with 44% in the Nordics, 40% in Germany and 32% in Southern Europe.

This is good news for retailers. AI may have moved beyond the early adopters, but adoption is not yet widespread. That creates a valuable but potentially short-lived window for retailers to prepare before it does.

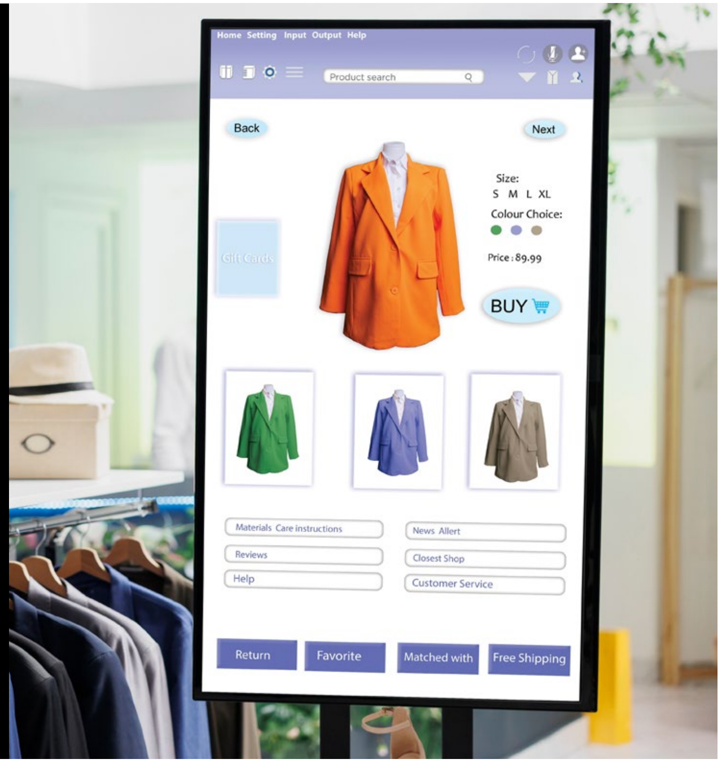
Retailers that invest now in structured product data, content consistency and quality, AI visibility and governance will build stronger foundations before consumer adoption accelerates further.

Retailers that wait until AI becomes the dominant discovery model will find themselves on the back foot, rebuilding core digital capabilities while their earlier-adopting peers are already reaping the benefits of AI-powered discovery. Put simply, success is now less about simply attracting clicks and instead about earning the confidence of AI systems themselves.

To make confident recommendations, AI relies on accurate, consistent and trustworthy information wherever a retailer's products appear online. If pricing differs across channels, product specifications don't match up, or products are unavailable, AI systems are less likely to recommend those retailers with confidence.

As AI platforms continue their evolution towards agentic commerce, retailers that invest now in data quality, content consistency and AI visibility will be best positioned to win in the next era of retail discovery.

Success is now less about simply attracting clicks and instead about earning the confidence of AI systems themselves



CHAPTER 3
WHY EXPERIENCE QUALITY IS THE NEW BATTLEGROUND

The previous chapter showed that despite the rapid growth of AI-powered discovery, as of right now, consumers still prefer to begin their shopping journey on retailer websites.

That means that retailers must focus on creating compelling on-site experiences that keep shoppers coming back for more. In the UK websites must be impressive enough to win new online customers, while in the Nordics user experience needs to be slick enough to win shoppers from competitors.

This is where AI can tip the balance in their favour, but they have to choose the right investments.

Personalised recommendations, AI-generated review summaries, visual search, chatbots and virtual try-on - collectively, these capabilities promise to make shopping faster and more relevant to the individual.

Our research suggests consumers are ready to embrace these AI-powered tools - but only if the experience meets their expectations.

CONSUMERS WANT AI TO SIMPLIFY SHOPPING

The data shows that across every region consumers are engaging with AI-powered tools that make shopping simpler.

Personalised product recommendations remain the most widely used AI capability on retailer websites, particularly in Southern Europe where two-thirds of consumers use them at least occasionally. This compares to 58% in both the UK and Nordics, and 57% in Germany. AI-generated

67%

of Southern Europeans use AI-powered personalised product recommendations

41%

of Nordic consumers report negative experiences of virtual try-on

57%

of UK consumers would spend less or refuse to spend if solely served by an AI assistant

review summaries are also being used by 65% of Southern Europeans, 54% of German shoppers, and 48% of Nordic and UK customers. Visual search is also gaining traction across every market, with 66% of Southern Europeans using it, 52% of Nordics, 51% in Germany and 50% in the UK.

Adoption varies by country, but the pattern is remarkably consistent across the various on-site AI tools we asked consumers about [see appendix page 25]. Consumers are looking for AI to reduce effort, save time and remove decision fatigue. This might be through summarising hundreds of customer reviews, recommending products they might like or helping them save time and hassle searching by locating products visually.

In many instances AI is evolving to become an invisible layer in the on-site experience, making site visits more seamless, enjoyable, and commercially effective.

EXPERIENCE QUALITY AS A REVENUE RISK

Not every AI capability has reached that level of maturity, however.

Despite attracting considerable investment across the retail industry, fewer than half of consumers in any market use virtual try-on even occasionally. More importantly, it receives net negative experience ratings across every region surveyed, making it the weakest-performing AI capability in the research [see charts 2-6, appendix, pages 25-26].

Chatbots and AI-generated reviews/summaries also receive net-negative reviews. In fact, the only AI-powered on-site tools that receive net-positive reviews across all markets are visual search and personalised product recommendations. The only exceptions are the Southern Europeans, who are net-positive about chat-bots and AI-generated reviews/summaries, and the Germans who are also net-positive about the latter. [See charts 7-11, appendix, pages 26-27].

Additionally, across every market, more than half of consumers say they would either spend less or refuse to spend if they knew they were interacting solely with an AI assistant rather than a human. This rises to 61% in the Nordics, followed by 57% in the UK, 54% in Germany and 52% in Southern Europe. [See chart 15, appendix, page 29].

By comparison, only around one in ten consumers say they would spend more when assisted by AI.

Virtual assistants and chatbots have become commonplace across the retail market, with leaders looking for ways to improve service and efficiency. However, this research suggests they may need to review experience quality before their virtual assistants reduce their revenue.

This doesn't mean consumers don't want automation. They just want accurate answers that solve their queries quickly.

This was illustrated further in the research. Around one third of consumers across Europe report receiving repetitive product recommendations [33% in the UK, 32% in Southern Europe and the Nordics, and 26% in Germany]. Incorrect chatbot responses remain a common frustration [28% in the UK, 32% in Southern Europe, 26% in Germany, and 32% in the Nordics], while many consumers also complain about irrelevant recommendations that fail to reflect what they are actually looking for [29% in the UK, 24% in Southern Europe, 23% in Germany, and 32% in the Nordics]. [See chart 13, appendix, page 28].

So, while growing numbers of consumers are using AI-powered tools on retail websites, many are not having a good experience of them when they do.

However, often the AI itself isn't to blame. Usually, weaknesses in AI reflect weak foundations. Bolting AI applications onto ageing legacy systems can cause complications. Poor data and inconsistent content mean both the AI tools retailers are investing in on their websites, and AI-powered discovery platforms directing customers to them do not have the information they rely upon to work effectively.

This shows the necessity of investing in a robust digital infrastructure that can ensure AI-tools on-site and AI-powered discovery off-site works seamlessly.

TRUST REMAINS THE DEFINING CHALLENGE

Alongside experience quality, trust will determine how quickly consumers embrace AI-powered retail.

The research shows that trust concerns are remarkably consistent across Europe.

All four markets are most concerned about the loss of human connection, wanting to deal with human customer service agents rather than chatbots. This is particularly the case in the UK [47%] and in the Nordics [46%], with Southern Europe [42%], and Germany [40%] not far behind [see chart 12, appendix, page 28].

Similarly, each of the four markets ranked privacy as their second biggest concern about using AI for online shopping – 36% in the UK and 35% in the UK, Southern Europe, Germany and the Nordics.

There are some subtle nuances, however. For example, while UK, German, and Nordic consumers are more concerned about AI showing them relevant products, Southern Europeans are more worried about transparency, and only happy to share data if they know how it will be used. At the same time, Southern Europeans are less concerned about over-personalisation than their continental peers.

Taken together, these findings show that trust cannot be treated as a single European challenge. Retailers will need to tailor how they introduce and communicate AI according to local consumer expectations, because shoppers immediately become more sceptical if when they suspect AI benefits the retailer more than it does them.

WHAT THIS MEANS FOR YOU

This chapter highlights a fundamental shift in how retailers should think about AI investment. Consumers are not asking for more AI - they are asking for better AI. They readily embrace AI that simplifies shopping and improves decision-fatigue, but will shop elsewhere if they encounter experiences that are inaccurate, repetitive or fail to add value.

The research suggests that poor AI is rarely a failure of the technology itself. More often, it reflects weak digital foundations. Personalised recommendations, chatbots, visual search and review summaries all depend on accurate product information, high-quality customer data and modern digital infrastructure to work effectively. Without these foundations, AI struggles to deliver the consistent experiences consumers increasingly expect.

For retail leaders, the strategic priority is clear. Rather than investing in yet more AI features, they should focus on building the digital foundations that enable AI to perform consistently well. The retailers that get those foundations right will be best placed to deliver trusted AI experiences that strengthen customer loyalty and generate sustainable growth.

33%

of UK consumers complain about repetitive product recommendations

61%

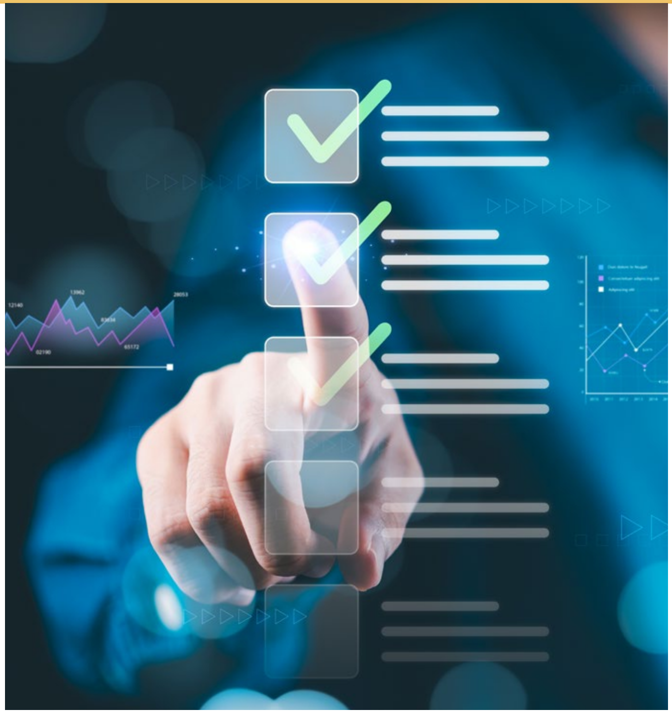
of Nordic consumers say they spend less when dealing with chatbots on retail websites, showing there is room for improvement

47%

of UK consumers are most concerned about AI reducing human connection online

CHAPTER 4
THE FUTURE POTENTIAL OF AI

This research shows European consumers are increasingly choosing to shop on retail websites that have better use of AI and spend more when they do



The next phase of AI growth in retail, however, is likely to be even more significant. Our research shows that consumers expect AI to play a bigger role in their future shopping experiences - and, increasingly, those expectations are influencing where they choose to shop.

This marks an important turning point for retailers. Until recently, the business case for AI has focused largely on operational efficiency, cost reduction and productivity. However, the data suggests that AI is becoming something much more valuable: a competitive differentiator that can influence customer acquisition, loyalty and revenue growth.

BETTER AI IS A COMPETITIVE ADVANTAGE

One of the most important findings within this research report is that AI is starting to influence retailer choice.

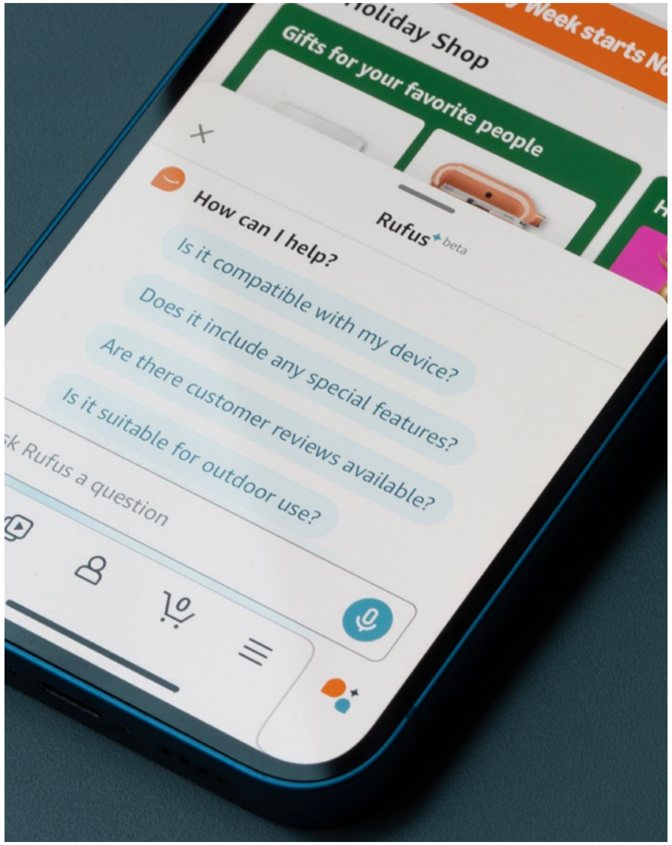
Nearly six in ten consumers in Southern Europe (59%) say they would choose one retailer over another because it offered better AI-tools on its website. Even in Europe's more mature and cautious markets, the impact is already significant, with around four in ten consumers in the UK, Germany and the Nordics saying better AI would influence where they shop [see chart 22, appendix, page 31].

59%

of Southern Europeans would choose one retailer over another because of better AI tools on its website

31%

of UK consumers would spend more with a retailer if they have the latest AI tools online to help guide them



Further to this, 37% of Southern Europeans say they would spend more with a retailer if they have the latest AI features online to help and guide them. Thirty-one percent of UK consumers say the same, as do 38% of Germans and 26% of Nordics [see chart 23, appendix, page 31].

Southern Europe – consistently the most positive region about the use of AI for shopping – could provide an early indication of where European retail is headed. Better use of AI looks set to become a key competitive advantage as consumer understanding of, and appetite for, AI grows.

This provides the most compelling case yet for retailers to invest in AI-powered discovery and AI tools on-site.

CONSUMER EXPECTATIONS ARE RISING

The research also reveals a growing gap between the AI experiences consumers want in the future and those many retailers currently provide.

Consumers are not asking retailers to introduce more AI features. They are asking for significant improvements to current AI tools.

Across every market, personalised recommendations remain the capability shoppers most want retailers to improve – 51% in Southern Europe, 46% in the Nordics, 45% in the UK, and 41% in Germany. This is followed by smarter chatbots with human-like responses - 43% in the Nordics, 42% in the UK, 37% in Southern Europe, and 33% in Germany - despite conversational AI remaining one of the less frequently used tools today. This demonstrates that if improvements can be made, consumer appetite for virtual assistants is there [see chart 21, appendix, page 31].

Today's consumer is increasingly used to using platforms such as ChatGPT and Google Gemini, and as a result they expect retailer chatbots to perform in the same way and with the same capability. This means understanding context and being able to answer complex queries in a truly conversational way.

However, many retailer chatbots are based on earlier technology, providing basic answers based on, in some cases, poor data quality. Retailer-deployed AI is therefore already playing catch-up, and that gap will widen unless retailers invest in higher quality AI implementations.

Consumers are also open to newer AI-powered experiences – 22% of Nordics and Southern Europeans want AR shopping experiences, and 20% of Germans want to use AI styling/ shopping assistants, for example.

Consumers want AI that removes complexity and helps them reach the best decision faster. They want the retailers and brands they shop with to understand their preferences, find them the best products, and provide genuinely useful advice that helps them buy with confidence.

Personalisation is one of the key opportunities emerging in this report. Better recommendations, more intelligent chatbots and more effective product discovery are likely to have greater commercial impact than investing heavily in emerging technologies.

WHAT THIS MEANS FOR YOU

This chapter has shown that consumers are increasingly willing to choose - and spend more with - retailers that deliver better AI-powered shopping experiences. This strengthens the commercial case for investment.

However, expectations are rising just as quickly. With consumers comparing retailer-deployed AI with the experiences they receive from platforms such as ChatGPT and Gemini, what they consider acceptable experiences today are unlikely to remain competitive for long. The priority for retailers is to deliver AI that improves the shopping journey through better personalisation, more intelligent product discovery and conversational assistance that adds real value.

As Chapter 3 demonstrated, delivering those experiences depends on strong digital foundations. High-quality data, modern commerce platforms and robust content management enable AI to perform consistently and earn customer trust.

The retailers that succeed will not be those deploying the most AI. They will be those that use AI to make shopping easier, more relevant and more helpful for customers. As AI increasingly influences where consumers shop and how much they spend, investing in high-quality AI experiences is becoming a growth strategy, not simply a technology strategy.

22%

of Southern Europeans would like to use AR shopping experiences

46%

of Nordic consumers want to see AI-powered personalised product recommendations improve

Better recommendations, more intelligent chatbots and more effective product discovery are likely to have greater commercial impact than investing heavily in emerging technologies

CONCLUSION

WHAT THIS MEANS FOR YOUR AI STRATEGY

Retailers serving European markets have a valuable window to build the digital infrastructure that will enable better AI experiences. But time is running out.

This research shows that while AI is already embedded in consumer shopping journeys, widespread adoption has yet to happen. However, based on its trajectory, that window won't be open for long and retailers can't afford to wait for it to close.

For the past two decades, retailers have competed to attract customers through channels they could optimise and control, such as their own websites, search engines and marketplaces. AI is disrupting that model. Increasingly, discovery is now happening on platforms retailers do not own, where success depends on whether AI systems understand, trust and recommend their products to the shopper.

That requires a rethink and a different approach. Rich and contextual product content, structured data, modern digital infrastructure and the ability to rapidly update digital experiences will become increasingly important as AI-powered discovery and agentic commerce continue to evolve – both to ensure products are surfaced by AI-powered discovery and to ensure on-site AI tools work properly.

The benefit of advancements in AI technology is in the speed with which retailers can make changes on-site. "Using AI prototyping we can in a day go from an idea to an alignment on what is the future that we will achieve.

Consumers are not looking for retailers to replace the shopping experience with AI. They are looking for retailers to make the shopping experience better

Of course, you always have to test it, but at least you go faster from idea to give it to the consumer and get something back," says Pierre Lempérière, deputy chief technology officer at French home improvement and DIY retailer ADEO.

The research also shows consumers are ready to reward retailers that get this right. Better AI experiences are already influencing retailer choice, while poor AI experiences damage trust and discourage spending. Retailers that invest in AI that makes shopping genuinely easier, more relevant and more helpful will gain significant competitive advantage.

As AI adoption accelerates, the cost of waiting will increase exponentially. Retailers that delay investment will find it harder to gain visibility within AI-driven discovery engines, find it harder to meet rising consumer expectations and more difficult to catch competitors that have already built the foundations for AI commerce.

"The unexpected effect of agentic commerce so far: it's brands, not aggregators, that are winning the traffic," says Malte Ubl, Chief Technology Officer at Vercel. "Agents go to the source. That's the leverage retailers have wanted back for a decade, but it only counts if brand.com is worth landing on: fast, distinctive, and built to convert the moment someone (human or agent) shows up. Brand is so back," he concludes.

The age of AI commerce is already underway. The retailers that invest now will be best positioned to compete in this new retail reality.

Two key questions that should guide your AI strategy

How do we become visible in AI-driven discovery?

- Make your storefront AEO-ready now. With AI search already overtaking social media as a discovery channel, visibility in AI ecosystems is becoming as commercially critical as SEO once was. Retailers need fast, indexable, reliably rendered pages that AI crawlers can access, cite, and recommend. The quality and consistency of your product data is no longer just a merchandising question, it's a revenue one.
- Stop treating site performance and AI capabilities as separate investments. The retailers that will win are those that can deliver world-class storefront performance and AI-powered experiences in the same stack. A fast experience without intelligence becomes a commodity. An AI experience built on slow or unreliable infrastructure doesn't ship.

How do we deliver AI experiences without degrading trust and quality of the experience?

- Prioritise personalisation and smarter assistants above all else. Consumers across every market are explicit about what they want most. Investment should follow that signal, not chase less proven technologies. The retailers that succeed will be those that ship and iterate on AI features quickly, with the release safety to do so without breaking the experience.
- Build for both human shoppers and AI agents. Your storefront now serves two audiences simultaneously. Structured data, rich product content, and machine-readable information are the foundation of both consumer trust and AI discoverability.
- The window to build AI-ready foundations is narrowing. Consumer adoption is moving faster than the internet did. Retailers that invest now in the digital infrastructure capable of supporting both human shoppers and AI agents will be best positioned to compete in the next era of discovery and commerce.

APPENDIX

We asked 4,000 European consumers 20 questions. We weren't able to include every chart in the main report, so here are the additional consumer answers for added insight.

ARE YOU AWARE THAT SOME ONLINE RETAILERS YOU SHOP WITH USE AI-POWERED TOOLS (for example, chatbots, product recommendations, or virtual try-ons)

	COUNTRY			
1	UK	SOUTHERN EUROPE	GERMANY	NORDICS
Yes	62%	42%	60%	66%
No	22%	42%	20%	19%
I'm not sure	16%	17%	20%	15%

VISUAL SEARCH (e.g., uploading an image to find alike products)

	COUNTRY			
2	UK	SOUTHERN EUROPE	GERMANY	NORDICS
Very often	11%	14%	9%	7%
Often	16%	21%	17%	17%
Sometimes	23%	31%	25%	29%
Not very often	12%	11%	14%	17%
Never	38%	23%	35%	31%
NET: Very often / Often	27%	35%	26%	24%
NET: Never / Not very often	50%	34%	49%	48%

WHICH OF THE FOLLOWING AI-POWERED FEATURES HAVE YOU USED WHILE SHOPPING ON RETAIL WEBSITES AND HOW OFTEN DO YOU USE THEM?

PERSONALISED PRODUCT RECOMMENDATIONS (e.g., “you may also like”)

	COUNTRY			
3	UK	SOUTHERN EUROPE	GERMANY	NORDICS
Very often	10%	12%	9%	6%
Often	20%	23%	19%	17%
Sometimes	29%	32%	29%	35%
Not very often	15%	13%	17%	19%
Never	27%	20%	25%	23%
NET: Very often / Often	29%	35%	28%	23%
NET: Never / Not very often	42%	33%	43%	42%

AI GENERATED REVIEWS/SUMMARIES

	COUNTRY			
4	UK	SOUTHERN EUROPE	GERMANY	NORDICS
Very often	9%	11%	11%	5%
Often	14%	24%	16%	14%
Sometimes	25%	30%	28%	29%
Not very often	15%	11%	13%	21%
Never	37%	24%	32%	31%
NET: Very often / Often	24%	35%	27%	19%
NET: Never / Not very often	52%	35%	46%	52%

WHICH OF THE FOLLOWING AI-POWERED FEATURES HAVE YOU USED WHILE SHOPPING ON RETAIL WEBSITES AND HOW OFTEN DO YOU USE THEM?

VIRTUAL TRY-ON (e.g., to try clothes, make-up, furniture)

	COUNTRY			
5	UK	SOUTHERN EUROPE	GERMANY	NORDICS
Very often	8%	7%	8%	4%
Often	10%	16%	12%	11%
Sometimes	17%	22%	18%	19%
Not very often	15%	17%	14%	16%
Never	51%	38%	48%	50%
NET: Very often / Often	18%	23%	20%	15%
NET: Never / Not very often	65%	55%	62%	66%

CHATBOTS/VIRTUAL CUSTOMER SERVICE ASSISTANTS

	COUNTRY			
6	UK	SOUTHERN EUROPE	GERMANY	NORDICS
Very often	9%	11%	8%	5%
Often	15%	18%	15%	15%
Sometimes	25%	30%	25%	31%
Not very often	19%	17%	18%	21%
Never	32%	25%	34%	28%
NET: Very often / Often	24%	28%	23%	20%
NET: Never / Not very often	52%	42%	52%	49%

ON A SCALE OF 1 TO 5 HOW WOULD YOU RATE YOUR EXPERIENCE OF USING THESE AI TOOLS?

VISUAL SEARCH (e.g., uploading an image to find alike products)

	COUNTRY			
7	UK	SOUTHERN EUROPE	GERMANY	NORDICS
1 - Extremely poor experience	13%	7%	9%	10%
2 - Not a great experience	15%	13%	16%	14%
3 - My experience was ok	40%	38%	47%	44%
4 - A good experience	22%	31%	21%	26%
5 - An excellent experience	9%	11%	8%	5%
NET: Extremely poor / Not a great experience	29%	20%	25%	24%
NET: An excellent / A good experience	31%	42%	29%	32%

PERSONALISED PRODUCT RECOMMENDATIONS (e.g., “you may also like”)

	COUNTRY			
8	UK	SOUTHERN EUROPE	GERMANY	NORDICS
1 - Extremely poor experience	12%	8%	9%	8%
2 - Not a great experience	15%	12%	16%	14%
3 - My experience was ok	43%	40%	47%	48%
4 - A good experience	22%	30%	21%	25%
5 - An excellent experience	8%	9%	7%	5%
NET: Extremely poor / Not a great experience	27%	21%	25%	22%
NET: An excellent / A good experience	30%	39%	28%	29%

ON A SCALE OF 1 TO 5 HOW WOULD YOU RATE YOUR EXPERIENCE OF USING THESE AI TOOLS?

CHATBOTS/VIRTUAL CUSTOMER SERVICE ASSISTANTS

	COUNTRY			
9	UK	SOUTHERN EUROPE	GERMANY	NORDICS
1 - Extremely poor experience	16%	10%	12%	13%
2 - Not a great experience	17%	19%	20%	21%
3 - My experience was ok	40%	39%	44%	43%
4 - A good experience	19%	26%	18%	20%
5 - An excellent experience	8%	6%	7%	3%
NET: Extremely poor / Not a great experience	34%	28%	31%	34%
NET: An excellent / A good experience	26%	33%	24%	23%

AI GENERATED REVIEWS/SUMMARIES

	COUNTRY			
10	UK	SOUTHERN EUROPE	GERMANY	NORDICS
1 - Extremely poor experience	13%	9%	9%	12%
2 - Not a great experience	17%	13%	15%	15%
3 - My experience was ok	42%	40%	48%	50%
4 - A good experience	18%	30%	22%	18%
5 - An excellent experience	9%	9%	6%	4%
NET: Extremely poor / Not a great experience	31%	22%	24%	28%
NET: An excellent / A good experience	27%	39%	28%	22%

VIRTUAL TRY-ON (e.g., to try clothes, make-up, furniture)

	COUNTRY			
11	UK	SOUTHERN EUROPE	GERMANY	NORDICS
1 - Extremely poor experience	19%	12%	13%	16%
2 - Not a great experience	19%	21%	22%	24%
3 - My experience was ok	39%	41%	46%	41%
4 - A good experience	16%	20%	14%	15%
5 - An excellent experience	6%	6%	5%	3%
NET: Extremely poor / Not a great experience	39%	33%	34%	41%
NET: An excellent / A good experience	22%	26%	19%	18%

WHAT CONCERNS, IF ANY, DO YOU HAVE ABOUT AI USE IN ONLINE SHOPPING?

	COUNTRY			
12	UK	SOUTHERN EUROPE	GERMANY	NORDICS
Human connection – I want to deal with human customer service agents, not a chatbot	47%	42%	40%	46%
Privacy - I'm not prepared to share personal data	36%	35%	33%	35%
Relevance – I don't trust it is showing me the best products either because it can't accurately find them or it is simply showing me sponsored products	33%	24%	28%	34%
Transparency – I'm happy to share my data, but I need to know how it will be used	27%	25%	24%	27%
Over-personalisation (e.g., I feel it's eliminating the fun/discovery element of shopping)	21%	15%	22%	21%
Something else – please specify	1%	1%	1%	1%

HAVE YOU EXPERIENCED ANY OF THE FOLLOWING NEGATIVE ISSUES WITH AI TOOLS WHILE SHOPPING ONLINE?

	COUNTRY			
13	UK	SOUTHERN EUROPE	GERMANY	NORDICS
Repetitive suggestions	33%	32%	26%	32%
Incorrect answers from chatbots	28%	27%	24%	38%
Irrelevant recommendations	29%	24%	23%	32%
Poor visual search results	16%	19%	14%	20%
Something else – please specify	1%	0%	1%	1%
I haven't experienced any negative issues	34%	32%	38%	23%

WHEN YOU SHOP ONLINE, WHAT DO YOU PREFER?

	COUNTRY			
14	UK	SOUTHERN EUROPE	GERMANY	NORDICS
AI assistants only	6%	9%	11%	8%
Human assistants only	52%	42%	44%	50%
A mix of both	42%	49%	46%	42%

WHEN YOU ARE USING THE AI-ASSISTANT (CHAT-BOT) ON A RETAILER'S WEBSITE, HOW DOES IT IMPACT THE AMOUNT (IN TERMS OF VALUE) YOU ARE WILLING TO SPEND?

	COUNTRY			
15	UK	SOUTHERN EUROPE	GERMANY	NORDICS
I won't spend if I know I am being served by an AI shopping assistant/chat-bot. I only want to be served by a human customer service agent	27%	21%	27%	29%
I'm likely to spend less with an AI shopping assistant/chat-bot compared to with a human customer service agent	30%	31%	27%	32%
I'm likely to spend about the same with an AI shopping assistant/chat-bot compared to with a human customer service agent	32%	38%	36%	32%
I'm likely to spend more than I normally do with an AI shopping assistant/chat-bot compared to with a human customer service agent	6%	7%	5%	5%
I'm likely to spend a lot more than I normally do with an AI shopping assistant/chat-bot compared to with a human customer service agent	4%	3%	5%	2%

IN THE FUTURE, HOW OFTEN WOULD YOU LIKE TO USE THESE AI-POWERED FEATURES ON RETAIL WEBSITES?

VISUAL SEARCH (e.g., uploading an image to find alike products)

	COUNTRY			
16	UK	SOUTHERN EUROPE	GERMANY	NORDICS
Regularly	9%	10%	9%	6%
More often	24%	27%	17%	18%
The same amount I do now	33%	39%	36%	41%
Less often	8%	10%	15%	14%
Never	25%	15%	23%	20%
NET: Regularly / More often	33%	37%	26%	24%
NET: Never / Less often	33%	25%	38%	35%

PERSONALISED PRODUCT RECOMMENDATIONS (e.g., "you may also like")

	COUNTRY			
17	UK	SOUTHERN EUROPE	GERMANY	NORDICS
Regularly	10%	10%	8%	5%
More often	19%	25%	17%	16%
The same amount I do now	37%	40%	39%	44%
Less often	11%	9%	16%	16%
Never	22%	15%	20%	18%
NET: Regularly / More often	29%	35%	25%	21%
NET: Never / Less often	34%	25%	37%	35%

IN THE FUTURE, HOW OFTEN WOULD YOU LIKE TO USE THESE AI-POWERED FEATURES ON RETAIL WEBSITES?

AI GENERATED REVIEWS/SUMMARIES

	COUNTRY			
18	UK	SOUTHERN EUROPE	GERMANY	NORDICS
Regularly	8%	9%	9%	4%
More often	17%	22%	16%	14%
The same amount I do now	35%	42%	38%	44%
Less often	14%	10%	14%	16%
Never	26%	17%	24%	22%
NET: Regularly / More often	25%	31%	24%	18%
NET: Never / Less often	40%	27%	38%	38%

CHATBOTS/VIRTUAL CUSTOMER SERVICE ASSISTANTS

	COUNTRY			
20	UK	SOUTHERN EUROPE	GERMANY	NORDICS
Regularly	7%	6%	8%	5%
More often	16%	19%	13%	11%
The same amount I do now	35%	41%	36%	42%
Less often	16%	16%	17%	20%
Never	25%	19%	26%	22%
NET: Regularly / More often	24%	25%	21%	16%
NET: Never / Less often	41%	34%	43%	42%

VIRTUAL TRY-ON (e.g., to try clothes, make-up, furniture)

	COUNTRY			
19	UK	SOUTHERN EUROPE	GERMANY	NORDICS
Regularly	7%	7%	7%	5%
More often	17%	20%	14%	16%
The same amount I do now	31%	38%	32%	34%
Less often	12%	12%	15%	16%
Never	32%	22%	32%	29%
NET: Regularly / More often	25%	28%	21%	20%
NET: Never / Less often	44%	34%	47%	46%

WHICH AI FEATURES WOULD YOU LIKE TO SEE IMPROVED OR INTRODUCED?

	COUNTRY			
21	UK	SOUTHERN EUROPE	GERMANY	NORDICS
More accurate/personalised product recommendations	45%	51%	41%	46%
Smarter chatbots with human-like responses	42%	37%	33%	43%
Voice-based shopping	20%	16%	26%	16%
AI styling/shopping assistants	18%	20%	20%	17%
Augmented reality (AR) shopping experiences	17%	22%	13%	22%
Something else – please specify	9%	5%	8%	8%

CONSIDERING EVERYTHING YOU HAVE ANSWERED TODAY, HOW LIKELY ARE YOU TO CHOOSE TO SHOP WITH ONE RETAILER OVER ANOTHER BECAUSE IT HAS BETTER USE OF AI TOOLS ON ITS WEBSITE?

	COUNTRY			
22	UK	SOUTHERN EUROPE	GERMANY	NORDICS
Very likely	13%	13%	11%	9%
Somewhat likely	30%	46%	29%	30%
Somewhat unlikely	20%	18%	31%	25%
Very unlikely	19%	13%	14%	17%
I'm not sure	18%	9%	16%	19%
NET: Very / Somewhat likely	43%	59%	40%	39%
NET: Very / Somewhat unlikely	39%	32%	45%	42%

CONSIDERING EVERYTHING YOU HAVE ANSWERED TODAY, DO YOU FEEL YOU ARE LIKELY TO SPEND MORE (in terms of the amount you spend) WITH YOUR CHOSEN RETAILER IF THEY HAVE THE LATEST AI FEATURES ONLINE TO HELP GUIDE YOU?

	COUNTRY			
23	UK	SOUTHERN EUROPE	GERMANY	NORDICS
Yes	31%	37%	28%	26%
No	43%	38%	49%	46%
I'm not sure	26%	25%	23%	28%

Consumers want AI that removes complexity and helps them reach the best decision faster

WORLD RETAIL CONGRESS

PARTNER

Vercel

ABOUT VERCEL

Vercel powers the storefronts and customer experiences for leading brands including Diageo, Salomon, Frasers Group, Breitling, and Elkjøp. From daily traffic to Black Friday-scale demand, Vercel delivers the speed, scalability, and reliability retailers need to convert more shoppers and protect revenue. With a global network, zero-downtime deployments, and AI-powered development tools, teams can ship faster and deliver fast, high-converting commerce experiences.

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