EARNING CONSUMER TRUST IN THE AGE OF AGENTIC COMMERCE

Understanding how AI assistants are reshaping the buyer journey

BROUGHT TO YOU BY VISA Intelligent Commerce

Contents

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Executive summary

Visa conducted research to understand how consumers are adapting to the rise of agentic commerce: the emerging world where AI acts on their behalf when shopping and buying. This report summarizes the results of that research covering the United States, Australia, and New Zealand. The full dataset can be found in the Appendix at the end of this report.

Across all three markets, consumers show striking consistency: most are already familiar with AI-powered shopping assistants,[1] and approximately one in three expect to use them regularly.[2] From discovery to checkout, AI is beginning to automate everyday buying decisions—and consumers are defining what makes those experiences trustworthy.

Three themes stand out:

1

Consistency across markets.

Patterns are aligned across the United States, Australia, and New Zealand, suggesting early universality in consumer expectations for transparency, security, and ease.

2

Convenience and savings drive adoption.

Roughly two-thirds of surveyed consumers use or would use AI shopping agents to save time and find better prices. Agents are valued for removing friction and simplifying purchase decisions.

3

Trust and control define loyalty.

Nearly nine in ten respondents want transparency into how agents make decisions, and about half would stop using them if that control disappeared.

Source: Visa Agentic Commerce Consumer Research Surveys — U.S., Australia, New Zealand (2025)

Visa research suggests that agentic commerce is no longer theoretical. It is a measurable shift in consumer behavior with the potential to significantly reshape how value moves through the digital economy. This report outlines how consumers are engaging with AI agents, what motivates or limits their use, and how Visa Intelligent Commerce empowers agents to deliver reliable and secure experiences at every step.

1 - Figure 1.1, 2.1, 3.1
2 - Figure 1.6, 2.6, 3.6

About the research

Objective

Understand consumer familiarity, adoption, motivators, barriers, and brand effect on perception and purchase related to AI-assisted shopping.

Method

15-minute online survey via AYTM agile consumer insights platform, among adults 18–65 who shop online monthly and hold a debit or credit card.

Focus

Measure "agentic substitution"— where AI tools replace or augment human decisions at each stage of the buyer journey.

Stimuli

Respondents were shown a video to illustrate the e-commerce shopping experience assisted by AI in four use cases (birthday gift, groceries, travel, electronics).

Scope

Nationally representative online surveys (United States n=1,600; Australia n=1,600; New Zealand n=500).

Survey results summarized

Visa Agentic Commerce Consumer research survey in US (2025)
Visa Agentic Commerce Consumer research survey in AU (2025)
Visa Agentic Commerce Consumer research survey in NZ (2025)

Our approach

We looked at how people in three markets would actually use an AI shopping assistant, from finding what they need to hitting "buy." Through four everyday shopping categories, we explored when and why people might let an AI agent step in to handle the tasks they normally do themselves.

Markets

Three regions studied:

- United States (n=1,600)
- Australia (n=1,600)
- New Zealand (n=500)

Product stages

Four phases of the buyer journey:

- Discovery
- Evaluation
- Cart selection
- Post-purchase

Shopping use cases

Four everyday shopping categories:

- Birthday gift
- Electronics
- Groceries
- Travel

Actions

Five key e-commerce touchpoints:

- Search engine
- Online marketplace
- Business website
- Social media
- Online ads

Consistent consumer insights across markets

Three consistent themes emerged when considering the three surveyed markets: familiarity with AI shopping assistants, how agents are reshaping the buyer journey, and the drivers and barriers influencing adoption. Together, these findings show how consumers everywhere are beginning to balance curiosity with caution—embracing agents when they deliver speed, savings, and control.

Across all three regions, consumer behavior shows strong alignment. Levels of awareness and motivation are similar, even as local preferences differ slightly.[3]

Key insight	United States	Australia	New Zealand
Familiar with AI shopping assistants	55%	59%	43%
Agent would increase consideration	35%	44%	34%
Top motivator	Save money	Time savings	Time savings
Top concern	Data privacy	Purchase accuracy	Loss of control

Source: Visa Agentic Commerce Consumer Research Surveys — U.S., Australia, New Zealand (2025)

Consumers across markets appear pragmatic. They want efficiency and control: less time spent searching and more assurance over how data is used.[4]

1. United States

Key insight

Familiarity with AI assistants is high (55%), and adoption is steady. Confidence correlates with understanding: those who know how agents work are most likely to delegate tasks.[5]

Implication

U.S. consumers reward brands that make AI-driven transactions transparent and reversible. Fraud protection, refund policies, and recognizable payment providers remain critical.[6]

2. Australia

Key insight

Australia leads in adoption (59% familiarity; 44% likely to use). Price sensitivity drives behavior. Australian survey respondents use agents to compare deals and optimize value, but transparency is non-negotiable; over half would abandon an agent if data use was unclear.[7]

Implication

Providers that demonstrate how tokenization safeguards data will maintain a competitive edge as adoption scales.[8]

3. New Zealand

Key insight

Familiarity is lower (43%) but growing. One-third of respondents in New Zealand say they're likely to try an AI agent within a year. Convenience and time savings outweigh novelty; users are pragmatic, not experimental.[9]

Implication

Hybrid experiences that pair human support with AI efficiency can help early adopters build confidence and trust.[10]

3 - Figure 1.1, 2.1 and 3.1
4 - Figure 1.1, 2.1 and 3.1
5 - Figure 1.1-1.2
6 - Figure 1.11-1.16
7 - Figure 2.1, 2.11 and 2.15
8 - Figure 2.13
9 - Figure 3.1, 3.6 and 3.11
10 - Figure 3.13

How agents are changing the buyer journey

Agentic substitution happens when an AI agent executes actions on a person's behalf. In all 3 countries, across every stage of the digital buyer journey, we see consumer interest in offloading tasks to AI shopping assistants.

Buyer journey stages and substitution rates

Discovery

Initial awareness , interest & early stage product exploration

Substitution rate

73%

Tasks replaced:
- Search engine
- Browsing site
- Social media
- Online ads

Evaluation

Comparing options, assessing sellers, preparing to purchase

Substitution rate

69%

Tasks replaced:
- Browsing different retailers
- Reading reviews
- Social media research

Cart & checkout

Confirming selections, looking for offers, completing payment

Substitution rate

62%

Tasks replaced:
- Add to cart
- Shipping information
- Applying discounts

Post-purchase

Awaiting delivery, returning, registering, reviewing

Substitution rate

64%

Tasks replaced:
- Tracking shipments
- Managing returns
- Warranty registration

Source: Visa Agentic Commerce Consumer Research Surveys — U.S., Australia, New Zealand (2025)
Average substitution rate per buyer journey stage based on average of all use cases (Birthday gift, electronics, groceries, and travel) across all markets (US, AU, and NZ) and weighted by sample size (US n=1600, AU n=1600, NZ n=500).

Control is the currency of trust

While consumers indicate they want AI to assist with some of the more time-consuming aspects of e-commerce like comparison shopping, there's still a strong desire for oversight. Roughly 85% of American respondents say it's important that they have visibility into data collection and the ability to customize or delete their shopping and purchase information which is consistent with other markets.[11]

11 - Figure 1.15

What drives and limits adoption

Drivers of adoption

Across markets, consumers view AI agents as tools, not novelty.[12]

- Automating repetitive tasks such as price comparison or reordering.
- Access to better deals and personalized recommendations.
- Reducing decision fatigue through relevant, filtered options.

Limits to adoption

Adoption barriers mirror concerns from past digital transitions.[13]

- Data privacy: Around 85%* want explicit control over the data agents can access.
- Purchase accuracy: Nearly 43%* worry an agent could select the wrong product.
- Loss of control: About 50%* fear "decisions made without me."

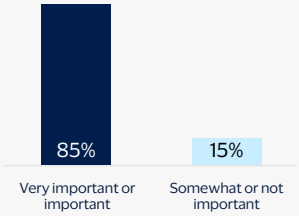
*Data points are average of responses across US, AU and NZ.

Most important factors when shopping online

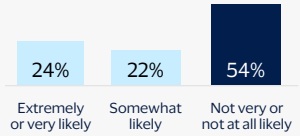
Concerns about AI shopping agent

Motivating factors for using agent

How important is control over data?



Would you still use an agent if you didn't have data control?



Source: Visa Agentic Commerce Consumer Research Surveys — U.S., Australia, New Zealand (2025)
All data tables represent an average across markets weighted by sample size.

12 - Figure 1.12, 2.12 and 3.12
13 - Figure 1.13, 2.13 and 3.13

What this means for payments and you

Agentic commerce is changing how key participants in the payments ecosystem create and sustain trust.

Consumers expectations are changing. Merchants, issuers, acquirers, wallets, and developers must collaborate to optimize agentic commerce. This means building the standards, data connections, and guardrails that make agentic commerce safe and scalable.

Merchants

Agents prioritize structured, machine-readable data: product information, pricing, availability, and clear policies.

Priorities

Help ensure products and policies are clear, consistent, and optimized for agents to understand and use.

Issuers

Cardholder trust must extend into AI-mediated transactions. Tokenization and risk analysis safeguard brand integrity.

Priorities

Be able to authenticate users across agentic channels with agent-ready tokens and APIs.

Acquirers

Merchant onboarding should remain simple. Existing frameworks already enable secure agentic payments.

Priorities

Clarify how to streamline acceptance for machine-initiated transactions via current tokenized systems.

Wallets

Wallets anchor user identity and preference management.

Priorities

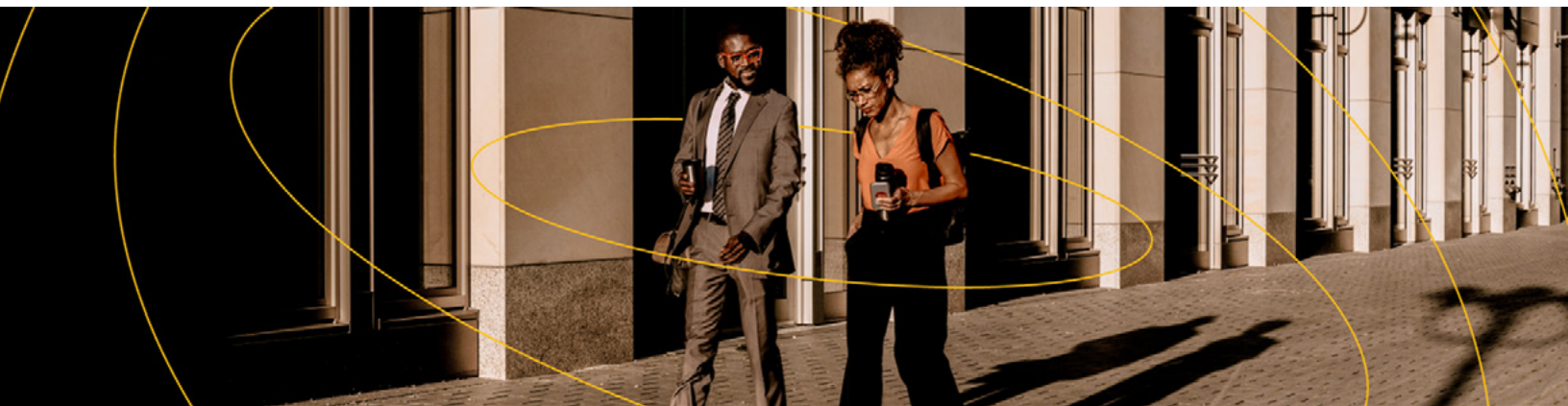
Start embedding agent permissions and spending controls to preserve confidence and choice.

Developers & AI partners

Developers define user experience but rely on stable infrastructure.

Priorities

Begin building common standards and capabilities with programs like Visa Intelligent Commerce.



Turning the agentic shift into strategic advantage

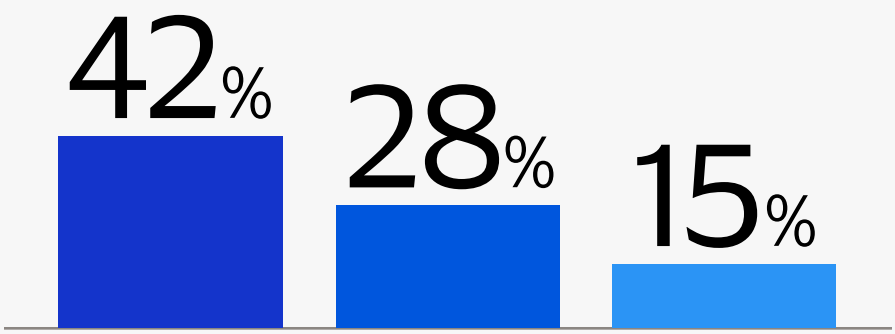
Across markets, more than a third of consumers indicated being more likely to shop with retailers offering agentic purchasing options; a clear signal that early infrastructure investment is likely to pay off.[14]

As one of the world's leading payment networks, Visa is positioned to turn this shift into shared advantage. The company's tokenization, security, and interoperability standards already underpin much of digital commerce; extending these to agentic environments helps to support safe and scalable innovation.

Visa Intelligent Commerce connects issuers, acquirers, wallets, developers, and AI platforms through shared trust protocols which can transform fragmented innovation into cohesive, reliable systems.

Trusted companies to provide AI

The three most common brands selected across markets were PayPal, Amazon, and Visa, indicating consumers may be more comfortable with shopping agents that originate from recognizable brands in the e-commerce space. Other brands receiving 20% or better aggregate interest include Apple, Google and Mastercard while about one in five US consumers said they would not feel comfortable using a shopping agent from any of the listed companies.[15]



Tier 1	Tier 2	Tier 3
PayPal	Apple	Microsoft
Amazon	Google	Meta
Visa	Mastercard	American Express

Source: Visa Agentic Commerce Consumer Research Surveys — U.S., Australia, New Zealand (2025)
All data represent an average across markets weighted by sample size.

14 - Figure 1.17, 2.17 and 3.17
15 - Figure 1.16, 2.16 and 3.16

Building the next era of commerce, together

Agentic commerce is accelerating from possibility to practice.

The question is no longer whether consumers will use AI agents, but which ecosystem players consumers and agents will trust and ultimately use. Visa Intelligent Commerce can help develop and extend trust through the global standards, infrastructure, and security that let innovation move safely and scale seamlessly.

Visa invites partners and potential partners to learn more about Visa Intelligent Commerce. Together we can:

Collaborate on shared standards and governance frameworks.

Pilot new agentic commerce solutions that demonstrate trust, transparency, and value.

Engage Visa Intelligent Commerce to power secure, scalable, and interoperable agentic experiences.

Together, we can develop the trust, governance, and interoperability that makes agentic commerce safe at scale and turn early adoption into durable advantage.

Get in touch

Let's talk about how we can build agentic commerce solutions together.

Learn more on Visa.com

Contact your Visa representative

Email our team

Appendix: Detailed results by market

Below are the results from the consumer surveys commissioned by Visa. Jump to a section: 2. AU | 3. NZ

1. United States

Figure 1.1: Consumer Familiarity and Usage Frequency

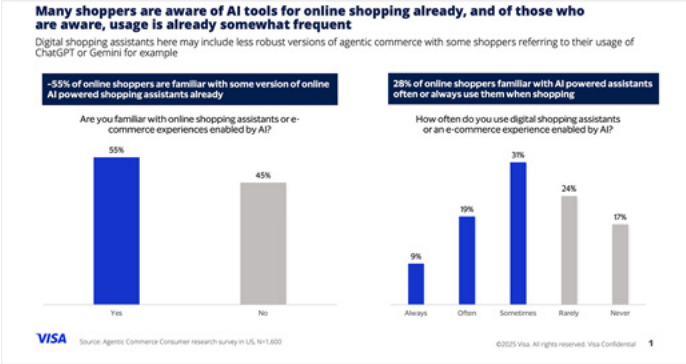


Figure 1.2: Gen AI Usage and Shopping Preference

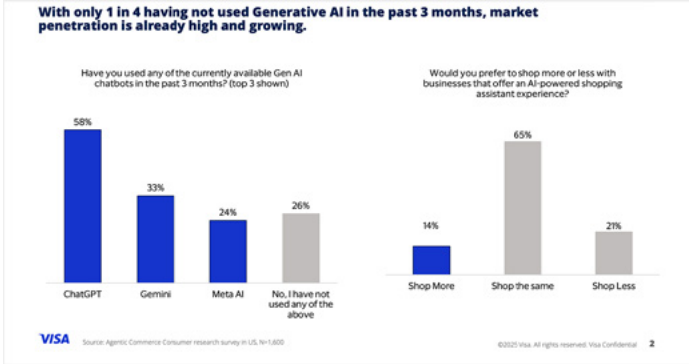


Figure 1.3: Digital vs In-Person and Agentic Replacement

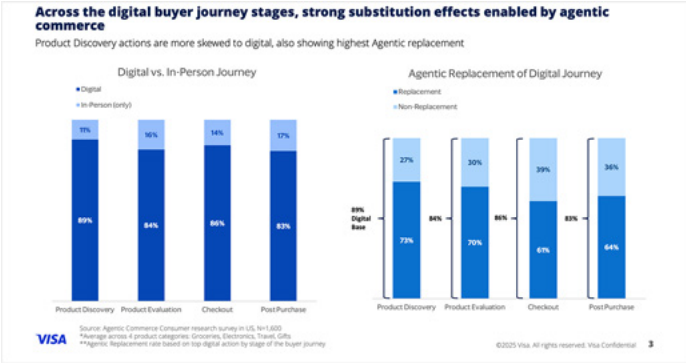


Figure 1.4: Use Cases Comparison

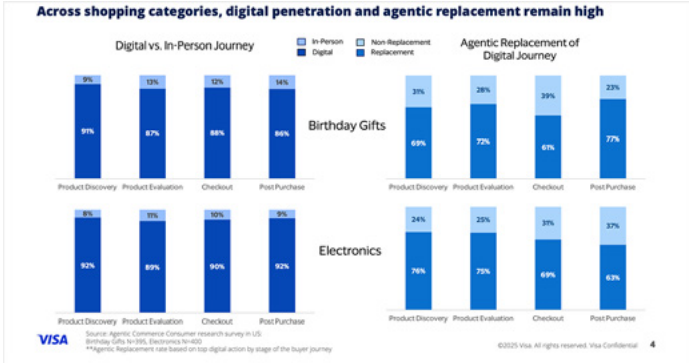


Figure 1.5: Additional Use Cases

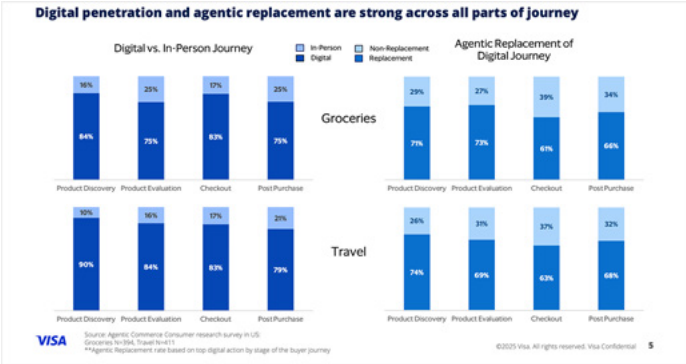


Figure 1.6: Agent Usage Frequency

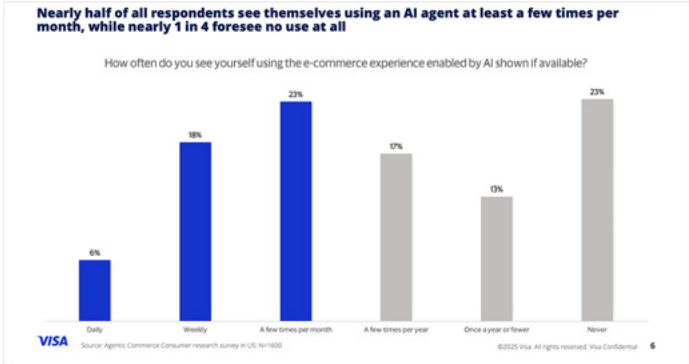


Figure 1.7: Product Discovery Stage

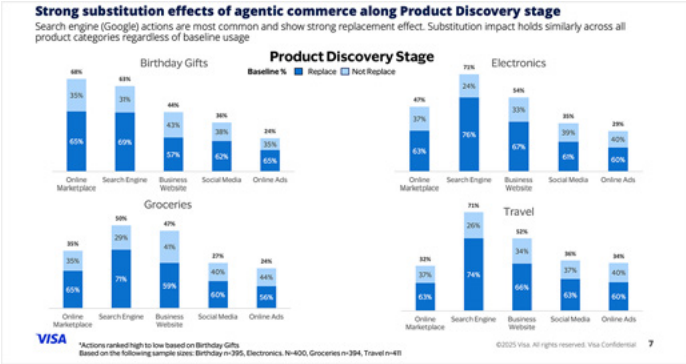
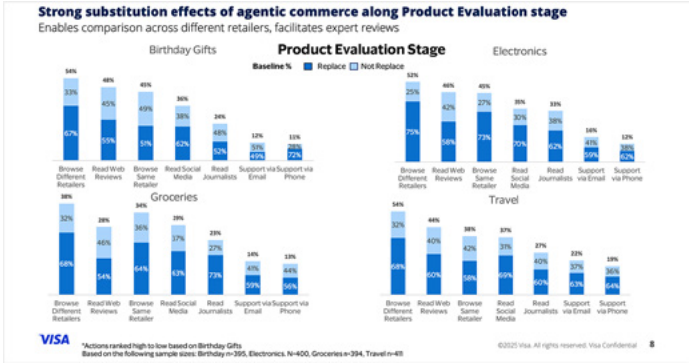


Figure 1.8: Product Evaluation Stage



Source: Agentic Commerce Consumer research survey in US. N=1,600

Appendix: Detailed results by market

1. United States (continued)

Figure 1.9: Cart Selection Stage

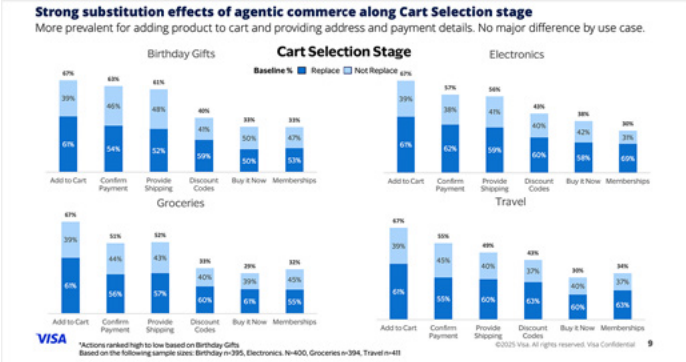


Figure 1.10: Post-purchase Stage

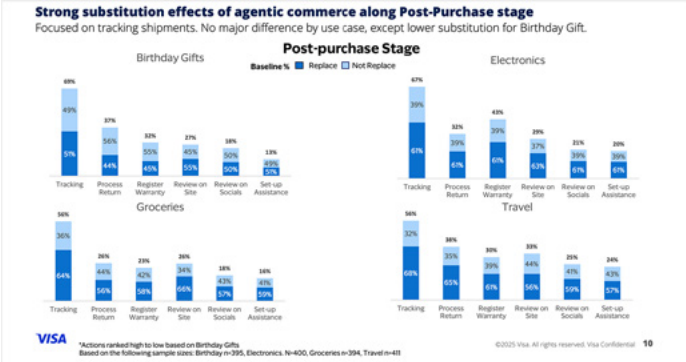


Figure 1.11: Most Important Factors

Figure 1.12: Motivations

Figure 1.13: Top Concerns

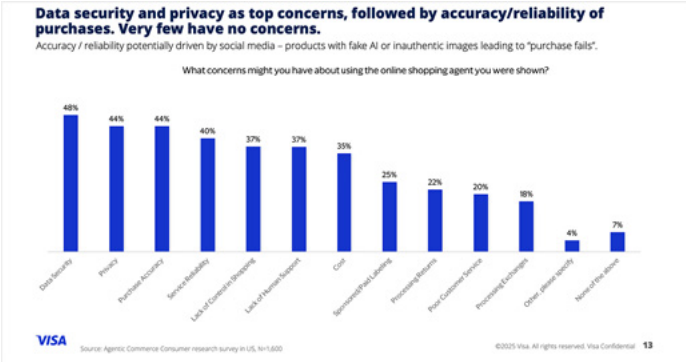


Figure 1.14: Personal Data Sharing

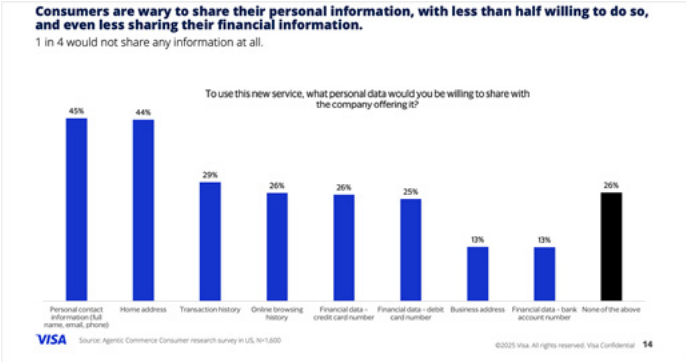


Figure 1.15: Controls and Transparency

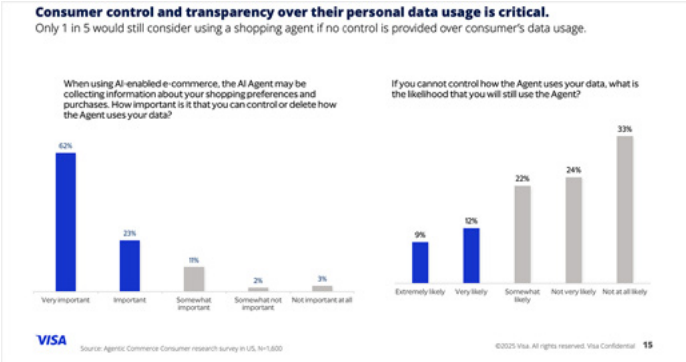


Figure 1.16: Most Trusted Brands

Source: Agentic Commerce Consumer research survey in US. N=1,600

Appendix: Detailed results by market

1. United States (continued)

Figure 1.17: Preference for Retailer with Agent

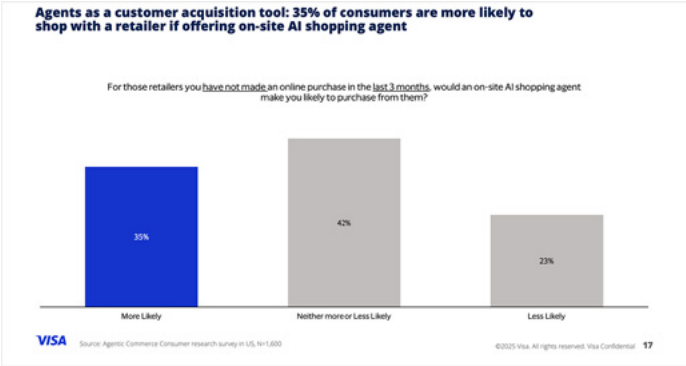


Figure 1.18: Online Retailers

2. Australia

Figure 2.1: Consumer Familiarity and Usage Frequency

Figure 2.2: Gen AI Usage and Shopping Preference

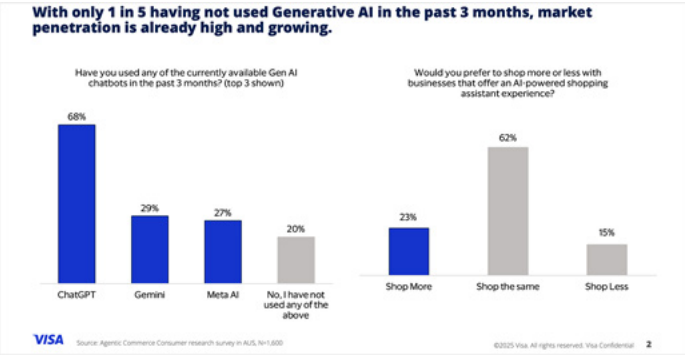
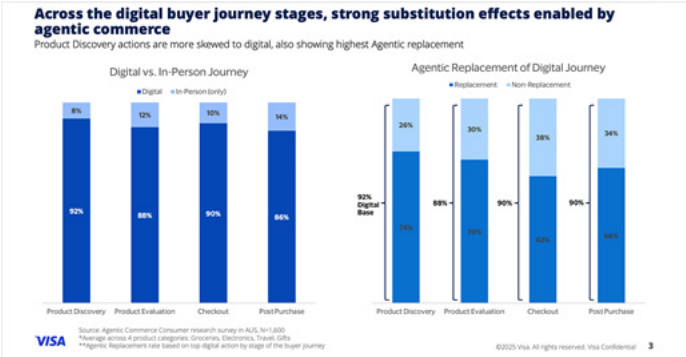


Figure 2.3: Substitution Effects



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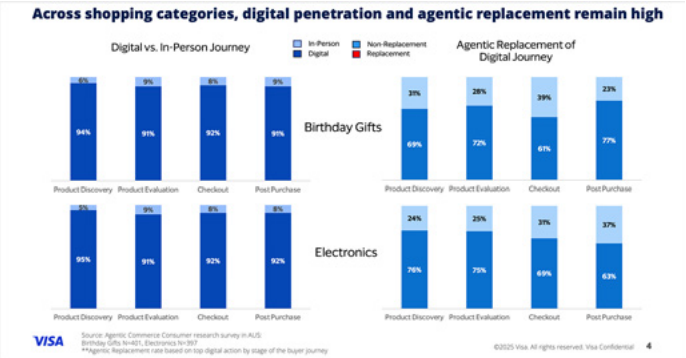


Figure 2.5: Additional Use Cases

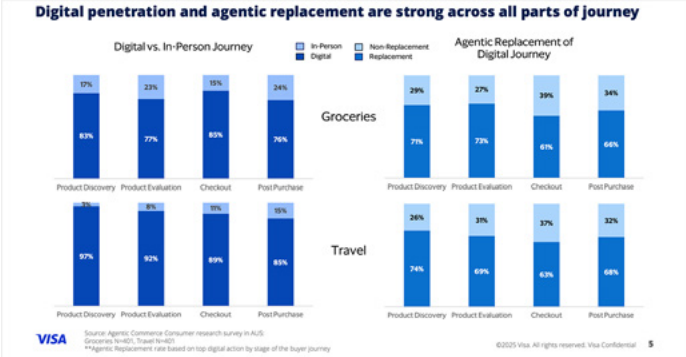
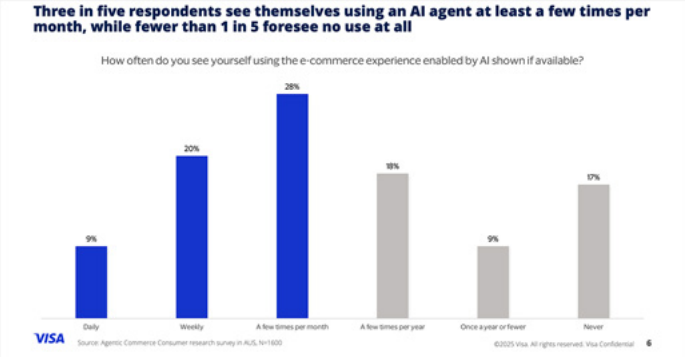


Figure 2.6: Agent Usage Frequency



Source: Agentic Commerce Consumer research survey in US and AU. N=1,600

Appendix: Detailed results by market

2. Australia (continued)

Figure 2.7: Product Discovery Stage

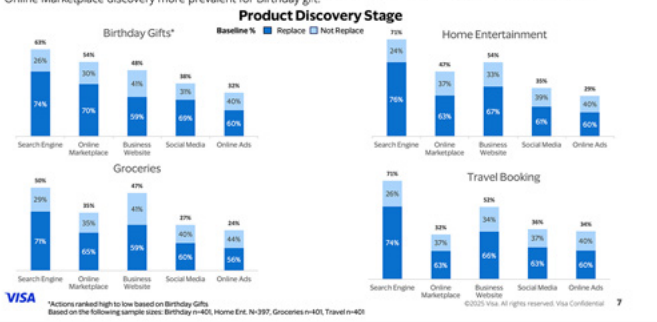


Figure 2.8: Product Evaluation Stage

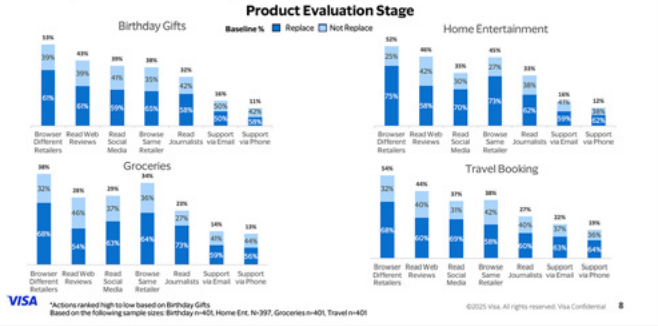


Figure 2.9: Cart Selection Stage

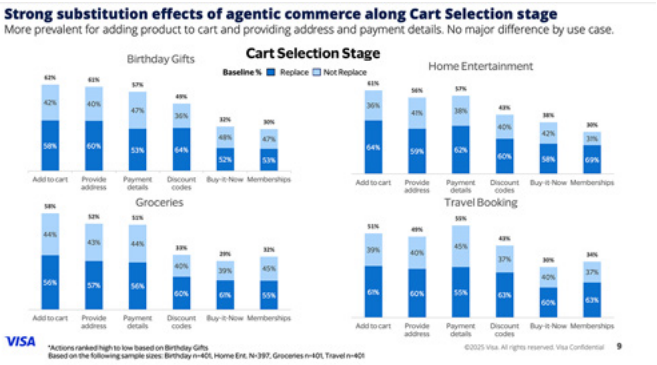


Figure 2.10: Post-Purchase Stage

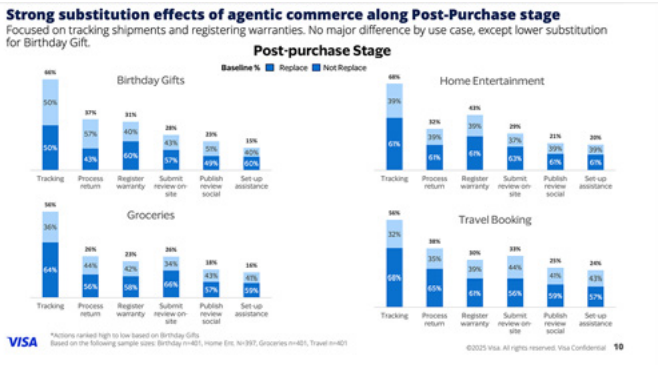


Figure 2.11: Most Important Factors

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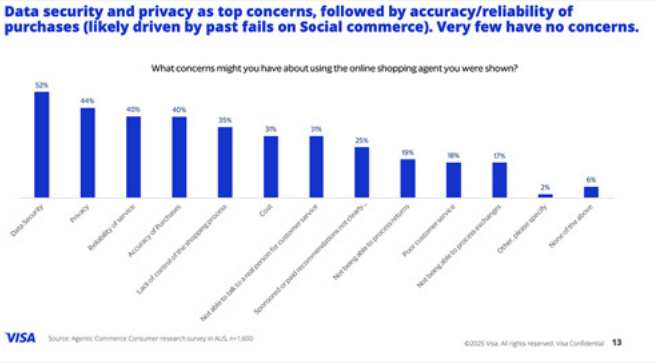
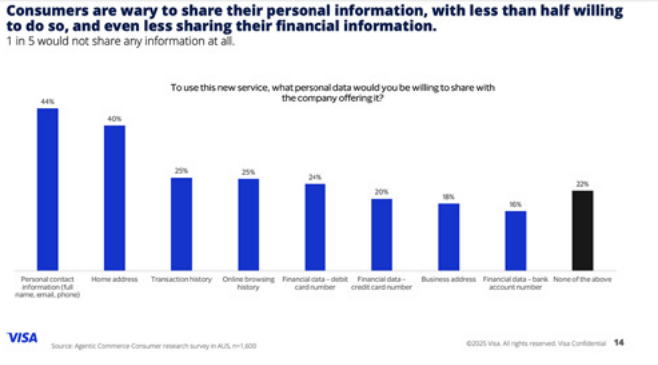


Figure 2.14: Personal Data Sharing



Source: Agentic Commerce Consumer research survey in AU. N=1,600

Appendix: Detailed results by market

2. Australia (continued)

Figure 2.15: Controls and Transparency

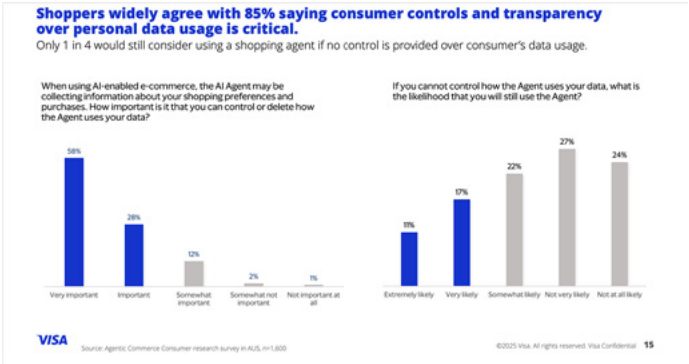


Figure 2.16: Most Trusted Brands

Figure 2.17: Preference for Retailer with Agent

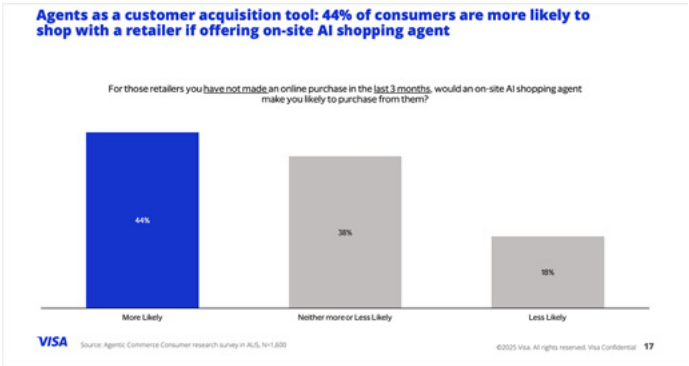


Figure 2.18: Online Retailers

3. New Zealand

Figure 3.1: Consumer Familiarity and Usage Frequency

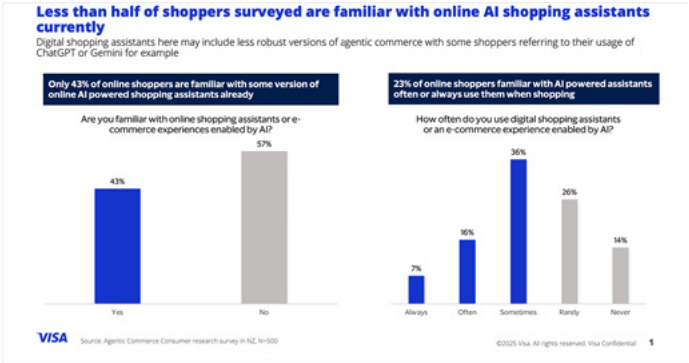


Figure 3.2: Gen AI Usage and Shopping Preference

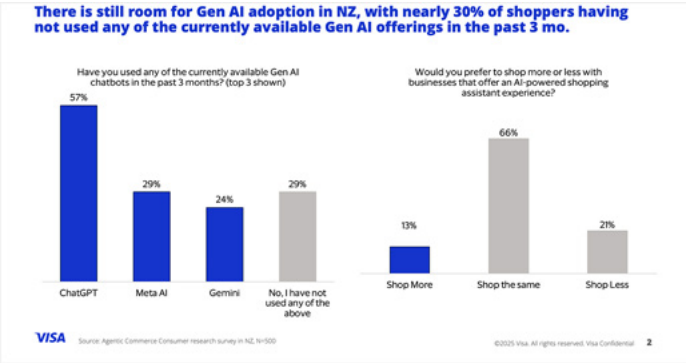


Figure 3.3: Substitution Effects

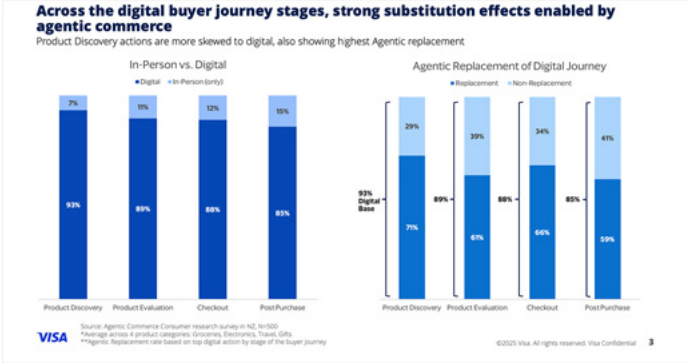
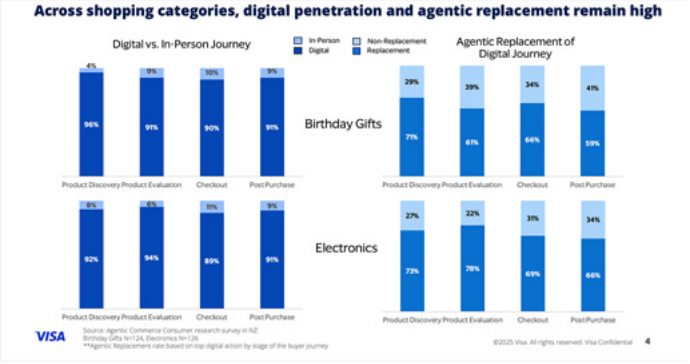


Figure 3.4: Use Cases Comparison



Source: Agentic Commerce Consumer research survey in AU and NZ. AU, N=1,600. NZ, N=500.

Appendix: Detailed results by market

3. New Zealand(continued)

Figure 3.5: Additional Use Cases

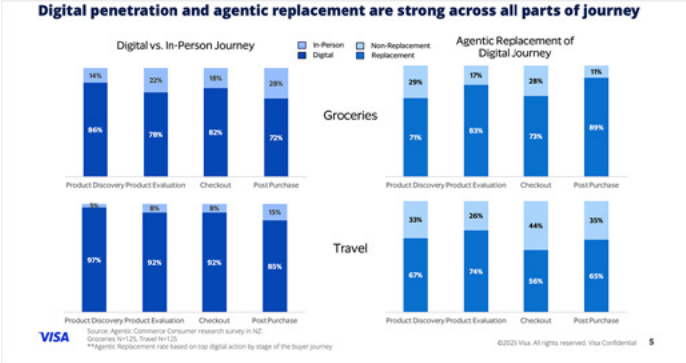


Figure 3.6: Agent Usage Frequency

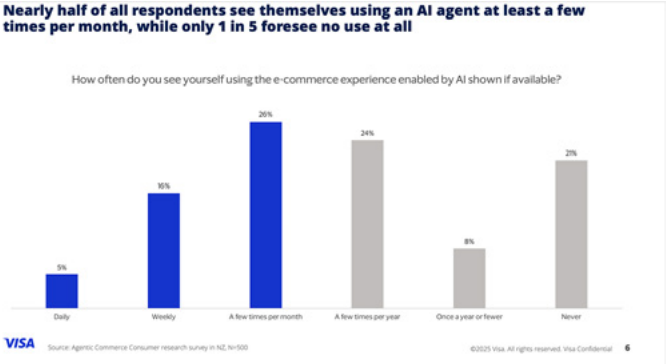


Figure 3.7: Product Discovery Stage

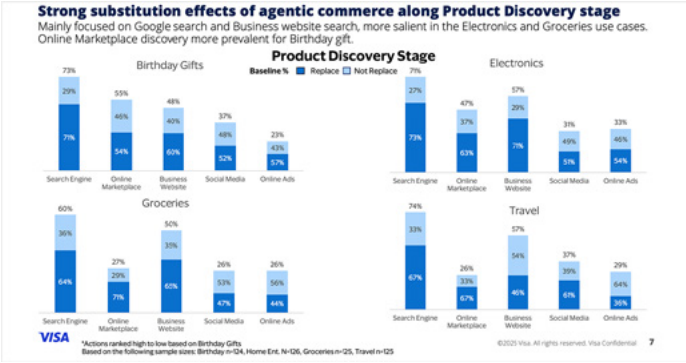


Figure 3.8: Product Evaluation Stage

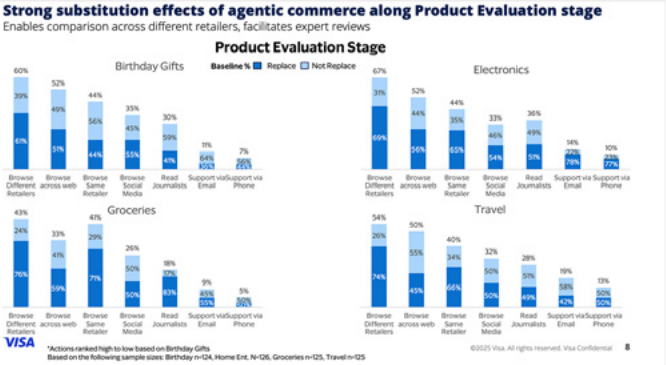


Figure 3.9: Cart Selection Stage

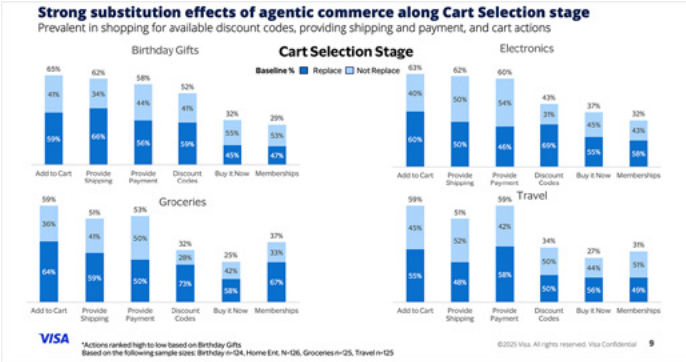


Figure 3.10: Post-Purchase Stage

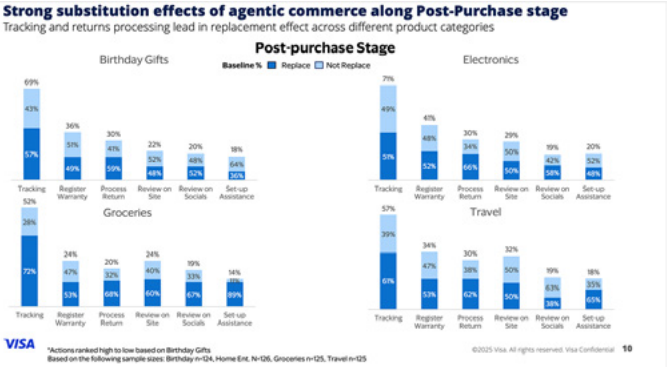


Figure 3.11: Most Important Factors

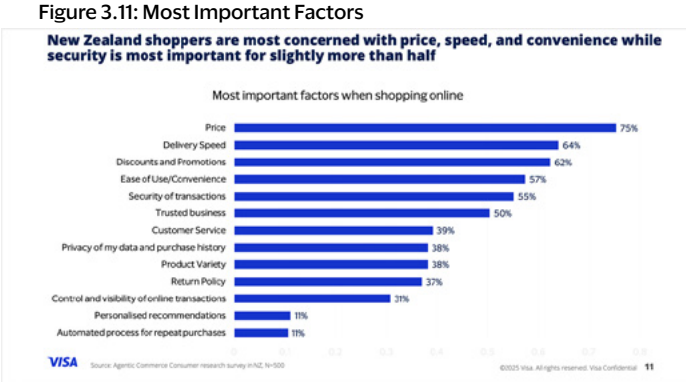
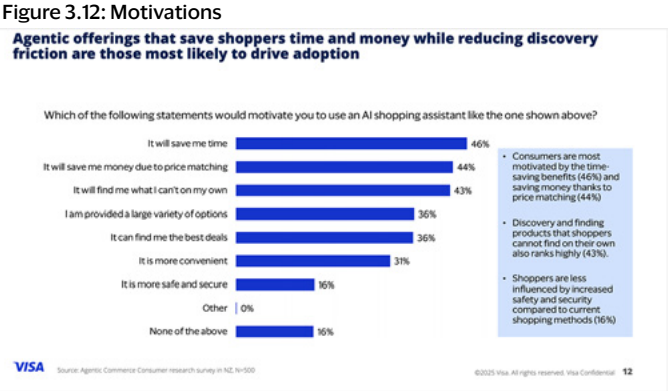


Figure 3.12: Motivations



Source: Agentic Commerce Consumer research survey in NZ. N=500

Appendix: Detailed results by market

3. New Zealand(continued)

Figure 3.13: Top Concerns

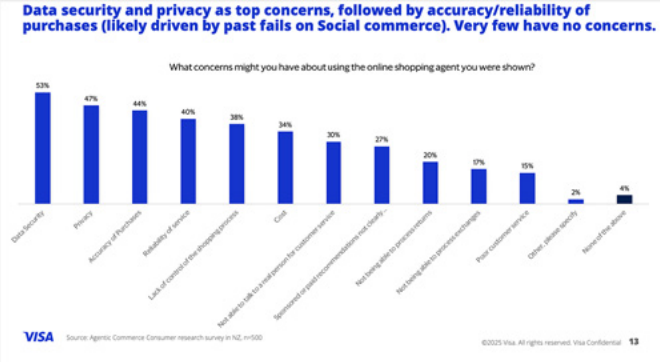


Figure 3.14: Personal Data Sharing

Figure 3.15: Controls and Transparency

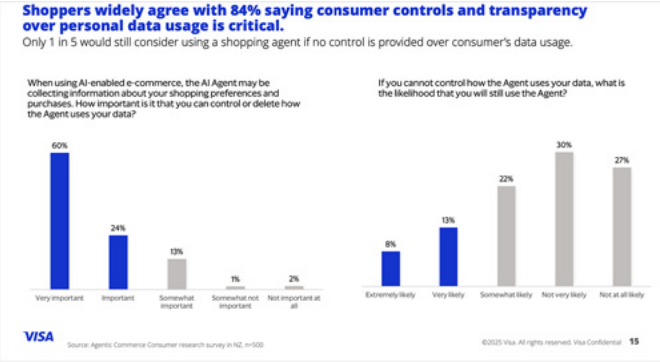


Figure 3.16: Most Trusted Brands

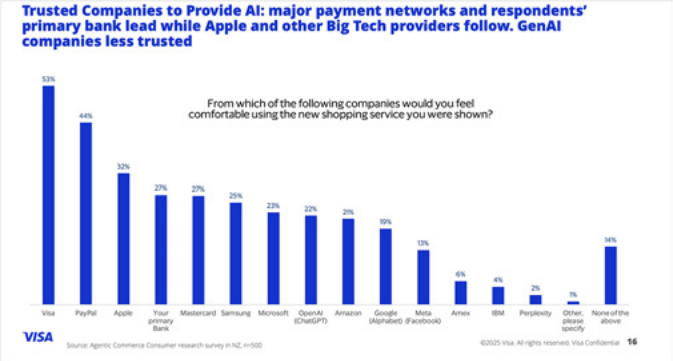


Figure 3.17: Preference for Retailer with Agent

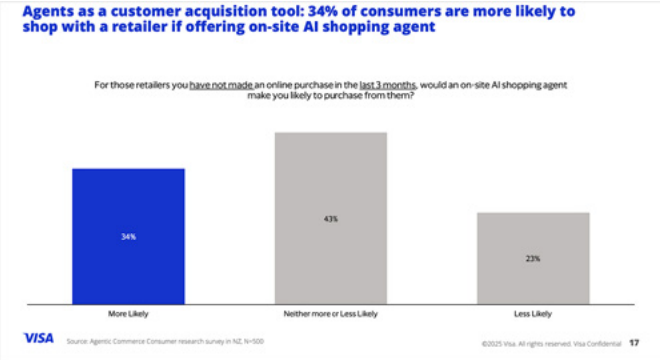


Figure 3.18: Online Retailers

Source: Agentic Commerce Consumer research survey in NZ. N=500

Accessibility Notes

1. United States

Figure 1.1: Consumer Familiarity and Usage Frequency

Summary: This figure presents data on consumer awareness and usage of AI-powered shopping assistants, showing that 55% of online shoppers are familiar with these tools, and among those aware, 28% use them frequently.

Chart Descriptions:

- **Chart A - Familiarity Question:** Bar chart titled "Are you familiar with online shopping assistants or e-commerce experiences enabled by AI?"
  - Yes: 55% (dark blue bar)
  - No: 45% (gray bar)
- **Chart B - Usage Frequency Question:** Bar chart titled "How often do you use digital shopping assistants or an e-commerce experience enabled by AI?"
  - Always: 9% (dark blue bar)
  - Often: 19% (dark blue bar)
  - Sometimes: 31% (dark blue bar)
  - Rarely: 24% (gray bar)
  - Never: 17% (gray bar)

Key Findings:

- 55% of online shoppers are familiar with some version of online AI-powered shopping assistants
- 28% of online shoppers familiar with AI-powered assistants often or always use them when shopping

Source: Agentic Commerce Consumer research survey in US, N=1,600

Figure 1.2: Gen AI Usage and Shopping Preferences

Summary: This figure shows high penetration of Generative AI usage, with only 1 in 4 respondents not having used it in the past 3 months. It also reveals consumer preferences regarding businesses that offer AI-powered shopping experiences.

Chart Descriptions:

- **Chart A - Gen AI Chatbot Usage:** Bar chart titled "Have you used any of the currently available Gen AI chatbots in the past 3 months? (top 3 shown)"
  - ChatGPT: 58% (dark blue bar)
  - Gemini: 33% (dark blue bar)
  - Meta AI: 24% (dark blue bar)
  - No, I have not used any of the above: 26% (gray bar)
- **Chart B - Shopping Preference:** Bar chart titled "Would you prefer to shop more or less with businesses that offer an AI-powered shopping assistant experience?"
  - Shop More: 14% (dark blue bar)
  - Shop the same: 65% (gray bar)
  - Shop Less: 21% (gray bar)

Key Findings: With only 1 in 4 having not used Generative AI in the past 3 months, market penetration is already high and growing.

Source: Agentic Commerce Consumer research survey in US, N=1,600

Figure 1.3: Digital vs In-Person and Agentic Replacement

Summary: This figure demonstrates strong substitution effects enabled by agentic commerce across the digital buyer journey stages. Product Discovery actions show the highest rate of digital preference and agentic replacement.

Chart Descriptions:

- **Chart A - Digital vs. In-Person Journey:** Stacked bar chart showing percentage distribution across four journey stages
  - Product Discovery: 89% Digital (dark blue), 11% In-Person only (light blue)
  - Product Evaluation: 84% Digital (dark blue), 16% In-Person only (light blue)
  - Checkout: 86% Digital (dark blue), 14% In-Person only (light blue)
  - Post Purchase: 83% Digital (dark blue), 17% In-Person only (light blue)
- **Chart B - Agentic Replacement of Digital Journey:** Stacked bar chart showing replacement vs. non-replacement percentages
  - Product Discovery: 73% Replacement (dark blue), 27% Non-Replacement (light blue) - 89% Digital Base
  - Product Evaluation: 70% Replacement (dark blue), 30% Non-Replacement (light blue) - 84% Digital Base
  - Checkout: 61% Replacement (dark blue), 39% Non-Replacement (light blue) - 86% Digital Base
  - Post Purchase: 64% Replacement (dark blue), 36% Non-Replacement (light blue) - 83% Digital Base

Key Finding: Product Discovery actions are more skewed to digital and show the highest Agentic replacement rate.

Source: Agentic Commerce Consumer research survey in US, N=1,600

Note: Average across 4 product categories: Groceries, Electronics, Travel, Gifts. Agentic Replacement rate based on top digital action by stage of the buyer journey.

Figure 1.4: Use Cases Comparison

Summary: This figure shows that across shopping categories (Birthday Gifts and Electronics), digital penetration and agentic replacement remain consistently high throughout all journey stages.

Chart Descriptions:

- **Chart A - Birthday Gifts, Digital vs. In-Person Journey:** Stacked bar chart
  - Product Discovery: 91% Digital (dark blue), 9% In-Person (light blue)
  - Product Evaluation: 87% Digital (dark blue), 13% In-Person (light blue)
  - Checkout: 88% Digital (dark blue), 12% In-Person (light blue)
  - Post Purchase: 86% Digital (dark blue), 14% In-Person (light blue)
- **Chart B - Birthday Gifts, Agentic Replacement:** Stacked bar chart
  - Product Discovery: 69% Replacement (dark blue), 31% Non-Replacement (light blue)
  - Product Evaluation: 72% Replacement (dark blue), 28% Non-Replacement (light blue)
  - Checkout: 61% Replacement (dark blue), 39% Non-Replacement (light blue)
  - Post Purchase: 77% Replacement (dark blue), 23% Non-Replacement (light blue)
- **Chart C - Electronics, Digital vs. In-Person Journey:** Stacked bar chart
  - Product Discovery: 92% Digital (dark blue), 8% In-Person (light blue)
  - Product Evaluation: 89% Digital (dark blue), 11% In-Person (light blue)
  - Checkout: 90% Digital (dark blue), 10% In-Person (light blue)
  - Post Purchase: 92% Digital (dark blue), 9% In-Person (light blue)
- **Chart D - Electronics, Agentic Replacement:** Stacked bar chart
  - Product Discovery: 76% Replacement (dark blue), 24% Non-Replacement (light blue)
  - Product Evaluation: 75% Replacement (dark blue), 25% Non-Replacement (light blue)
  - Checkout: 69% Replacement (dark blue), 31% Non-Replacement (light blue)
  - Post Purchase: 63% Replacement (dark blue), 37% Non-Replacement (light blue)

Source: Agentic Commerce Consumer research survey in US; Birthday Gifts N=395, Electronics N=400

Note: Agentic Replacement rate based on top digital action by stage of the buyer journey.

Accessibility Notes

1. United States (continued)

Figure 1.5: Additional Use Cases

Summary: This figure demonstrates that digital penetration and agentic replacement are strong across all parts of the buyer journey for both Groceries and Travel categories.

Chart Descriptions:

- **Chart A - Groceries, Digital vs. In-Person Journey:** Stacked bar chart
  - Product Discovery: 84% Digital (dark blue), 16% In-Person (light blue)
  - Product Evaluation: 75% Digital (dark blue), 25% In-Person (light blue)
  - Checkout: 83% Digital (dark blue), 17% In-Person (light blue)
  - Post Purchase: 75% Digital (dark blue), 25% In-Person (light blue)
- **Chart B - Groceries, Agentic Replacement:** Stacked bar chart
  - Product Discovery: 71% Replacement (dark blue), 29% Non-Replacement (light blue)
  - Product Evaluation: 73% Replacement (dark blue), 27% Non-Replacement (light blue)
  - Checkout: 61% Replacement (dark blue), 39% Non-Replacement (light blue)
  - Post Purchase: 66% Replacement (dark blue), 34% Non-Replacement (light blue)
- **Chart C - Travel, Digital vs. In-Person Journey:** Stacked bar chart
  - Product Discovery: 90% Digital (dark blue), 10% In-Person (light blue)
  - Product Evaluation: 84% Digital (dark blue), 16% In-Person (light blue)
  - Checkout: 83% Digital (dark blue), 17% In-Person (light blue)
  - Post Purchase: 79% Digital (dark blue), 21% In-Person (light blue)
- **Chart D - Travel, Agentic Replacement:** Stacked bar chart
  - Product Discovery: 74% Replacement (dark blue), 26% Non-Replacement (light blue)
  - Product Evaluation: 69% Replacement (dark blue), 31% Non-Replacement (light blue)
  - Checkout: 63% Replacement (dark blue), 37% Non-Replacement (light blue)
  - Post Purchase: 68% Replacement (dark blue), 32% Non-Replacement (light blue)

Source: Agentic Commerce Consumer research survey in US; Groceries N=394, Travel N=411

Note: Agentic Replacement rate based on top digital action by stage of the buyer journey.

Figure 1.6: Agent Usage Frequency

Summary: This figure shows anticipated usage patterns for AI-enabled e-commerce experiences, with nearly half of all respondents expecting to use an AI agent at least a few times per month, while nearly 1 in 4 foresee no use at all.

Chart Descriptions:

- **Chart A - Usage Frequency Projection:** Bar chart titled "How often do you see yourself using the e-commerce experience enabled by AI shown if available?"
  - Daily: 6% (dark blue bar)
  - Weekly: 18% (dark blue bar)
  - A few times per month: 23% (dark blue bar)
  - A few times per year: 17% (gray bar)
  - Once a year or fewer: 13% (gray bar)
  - Never: 23% (gray bar)

Key Findings: Nearly half of all respondents see themselves using an AI agent at least a few times per month, while nearly 1 in 4 foresee no use at all.

Source: Agentic Commerce Consumer research survey in US: N=1600

Accessibility Notes

1. United States (continued)

Figure 1.7: Product Discovery Stage

Summary: This figure illustrates strong substitution effects of agentic commerce during the Product Discovery stage, with search engine (Google) actions being most common and showing strong replacement effects. Substitution impact holds similarly across all product categories regardless of baseline usage.

Chart Descriptions:

- **Chart A - Birthday Gifts, Product Discovery Stage:** Grouped bar chart with baseline percentage and replacement split
  - Online Marketplace: 68% baseline (35% Replace in dark blue, 35% Not Replace in light blue)
  - Search Engine: 63% baseline (31% Replace in dark blue, 31% Not Replace in light blue)
  - Social Media: 36% baseline (38% Replace in dark blue, 62% Not Replace in light blue)
  - Online Ads: 24% baseline (35% Replace in dark blue, 65% Not Replace in light blue)
- **Chart B - Electronics, Product Discovery Stage:** Grouped bar chart
  - Online Marketplace: 71% baseline (47% Replace in dark blue, 37% Not Replace in light blue)
  - Search Engine: 54% baseline (24% Replace in dark blue, 76% Not Replace in light blue)
  - Business Website: 47% baseline (33% Replace in dark blue, 67% Not Replace in light blue)
  - Social Media: 35% baseline (39% Replace in dark blue, 61% Not Replace in light blue)
  - Online Ads: 29% baseline (40% Replace in dark blue, 60% Not Replace in light blue)
- **Chart C - Groceries, Product Discovery Stage:** Grouped bar chart
  - Online Marketplace: 35% baseline (35% Replace in dark blue, 65% Not Replace in light blue)
  - Search Engine: 50% baseline (29% Replace in dark blue, 71% Not Replace in light blue)
  - Business Website: 47% baseline (41% Replace in dark blue, 59% Not Replace in light blue)
  - Social Media: 27% baseline (40% Replace in dark blue, 60% Not Replace in light blue)
  - Online Ads: 24% baseline (44% Replace in dark blue, 56% Not Replace in light blue)
- **Chart D - Travel, Product Discovery Stage:** Grouped bar chart
  - Online Marketplace: 32% baseline (37% Replace in dark blue, 63% Not Replace in light blue)
  - Search Engine: 71% baseline (26% Replace in dark blue, 74% Not Replace in light blue)
  - Business Website: 52% baseline (34% Replace in dark blue, 66% Not Replace in light blue)
  - Social Media: 36% baseline (37% Replace in dark blue, 63% Not Replace in light blue)
  - Online Ads: 34% baseline (40% Replace in dark blue, 60% Not Replace in light blue)

Key Finding: Search engine (Google) actions are most common and show strong replacement effect. Substitution impact holds similarly across all product categories regardless of baseline usage.

Source: Based on the following sample sizes: Birthday n=395, Electronics N=400, Groceries n=394, Travel n=411

Note: Actions ranked high to low based on Birthday Gifts.

Figure 1.8: Product Evaluation Stage

Summary: This figure shows strong substitution effects of agentic commerce during the Product Evaluation stage, which enables comparison across different retailers and facilitates expert reviews.

Chart Descriptions:

- **Chart A - Birthday Gifts, Product Evaluation Stage:** Grouped bar chart
  - Browse Different Retailers: 54% baseline (33% Replace in dark blue, 67% Not Replace in light blue)
  - Read Web Reviews: 48% baseline (45% Replace in dark blue, 55% Not Replace in light blue)
  - Browse Same Retailer: 45% baseline (49% Replace in dark blue, 51% Not Replace in light blue)
  - Read Social Media: 36% baseline (38% Replace in dark blue, 62% Not Replace in light blue)
  - Read Journalists: 24% baseline (48% Replace in dark blue, 52% Not Replace in light blue)
  - Support via Email: 12% baseline (51% Replace in dark blue, 49% Not Replace in light blue)
  - Support via Phone: 11% baseline (72% Replace in dark blue, 28% Not Replace in light blue)
- **Chart B - Electronics, Product Evaluation Stage:** Grouped bar chart
  - Browse Different Retailers: 52% baseline (25% Replace in dark blue, 75% Not Replace in light blue)
  - Read Web Reviews: 46% baseline (42% Replace in dark blue, 58% Not Replace in light blue)
  - Browse Same Retailer: 45% baseline (27% Replace in dark blue, 73% Not Replace in light blue)
  - Read Social Media: 35% baseline (30% Replace in dark blue, 70% Not Replace in light blue)
  - Read Journalists: 33% baseline (38% Replace in dark blue, 62% Not Replace in light blue)
  - Support via Email: 16% baseline (41% Replace in dark blue, 59% Not Replace in light blue)
  - Support via Phone: 12% baseline (62% Replace in dark blue, 38% Not Replace in light blue)
- **Chart C - Groceries, Product Evaluation Stage:** Grouped bar chart
  - Browse Different Retailers: 38% baseline (32% Replace in dark blue, 68% Not Replace in light blue)
  - Read Web Reviews: 28% baseline (46% Replace in dark blue, 54% Not Replace in light blue)
  - Browse Same Retailer: 34% baseline (36% Replace in dark blue, 64% Not Replace in light blue)
  - Read Social Media: 29% baseline (37% Replace in dark blue, 63% Not Replace in light blue)
  - Read Journalists: 23% baseline (27% Replace in dark blue, 73% Not Replace in light blue)
  - Support via Email: 14% baseline (41% Replace in dark blue, 59% Not Replace in light blue)
  - Support via Phone: 13% baseline (44% Replace in dark blue, 56% Not Replace in light blue)
- **Chart D - Travel, Product Evaluation Stage:** Grouped bar chart
  - Browse Different Retailers: 54% baseline (32% Replace in dark blue, 68% Not Replace in light blue)
  - Read Web Reviews: 44% baseline (40% Replace in dark blue, 60% Not Replace in light blue)
  - Browse Same Retailer: 38% baseline (42% Replace in dark blue, 58% Not Replace in light blue)
  - Read Social Media: 37% baseline (31% Replace in dark blue, 69% Not Replace in light blue)
  - Read Journalists: 27% baseline (40% Replace in dark blue, 60% Not Replace in light blue)
  - Support via Email: 22% baseline (37% Replace in dark blue, 63% Not Replace in light blue)
  - Support via Phone: 19% baseline (36% Replace in dark blue, 64% Not Replace in light blue)

Key Finding: Enables comparison across different retailers, facilitates expert reviews.

Source: Based on the following sample sizes: Birthday n=395, Electronics N=400, Groceries n=394, Travel n=411

Note: Actions ranked high to low based on Birthday Gifts.

Accessibility Notes

1. United States (continued)

Figure 1.9: Cart Selection Stage

Summary: This figure demonstrates strong substitution effects of agentic commerce during the Cart Selection stage, which is more prevalent for adding products to cart and providing address and payment details. No major difference exists by use case.

Chart Descriptions:

- **Chart A - Birthday Gifts, Cart Selection Stage:** Grouped bar chart
  - Add to Cart: 67% baseline (39% Replace in dark blue, 61% Not Replace in light blue)
  - Confirm Payment: 63% baseline (46% Replace in dark blue, 54% Not Replace in light blue)
  - Provide Shipping: 61% baseline (48% Replace in dark blue, 52% Not Replace in light blue)
  - Discount Codes: 40% baseline (41% Replace in dark blue, 59% Not Replace in light blue)
  - Buy it Now: 33% baseline (50% Replace in dark blue, 50% Not Replace in light blue)
  - Memberships: 33% baseline (47% Replace in dark blue, 53% Not Replace in light blue)
- **Chart B - Electronics, Cart Selection Stage:** Grouped bar chart
  - Add to Cart: 67% baseline (39% Replace in dark blue, 61% Not Replace in light blue)
  - Confirm Payment: 57% baseline (38% Replace in dark blue, 62% Not Replace in light blue)
  - Provide Shipping: 56% baseline (41% Replace in dark blue, 59% Not Replace in light blue)
  - Discount Codes: 43% baseline (40% Replace in dark blue, 60% Not Replace in light blue)
  - Buy it Now: 38% baseline (42% Replace in dark blue, 58% Not Replace in light blue)
  - Memberships: 30% baseline (31% Replace in dark blue, 69% Not Replace in light blue)
- **Chart C - Groceries, Cart Selection Stage:** Grouped bar chart
  - Add to Cart: 67% baseline (39% Replace in dark blue, 61% Not Replace in light blue)
  - Confirm Payment: 51% baseline (44% Replace in dark blue, 56% Not Replace in light blue)
  - Provide Shipping: 52% baseline (43% Replace in dark blue, 57% Not Replace in light blue)
  - Discount Codes: 33% baseline (40% Replace in dark blue, 60% Not Replace in light blue)
  - Buy it Now: 29% baseline (39% Replace in dark blue, 61% Not Replace in light blue)
  - Memberships: 32% baseline (45% Replace in dark blue, 55% Not Replace in light blue)
- **Chart D - Travel, Cart Selection Stage:** Grouped bar chart
  - Add to Cart: 67% baseline (39% Replace in dark blue, 61% Not Replace in light blue)
  - Confirm Payment: 55% baseline (45% Replace in dark blue, 55% Not Replace in light blue)
  - Provide Shipping: 49% baseline (40% Replace in dark blue, 60% Not Replace in light blue)
  - Discount Codes: 43% baseline (37% Replace in dark blue, 63% Not Replace in light blue)
  - Buy it Now: 30% baseline (40% Replace in dark blue, 60% Not Replace in light blue)
  - Memberships: 34% baseline (37% Replace in dark blue, 63% Not Replace in light blue)

Key Finding: More prevalent for adding product to cart and providing address and payment details. No major difference by use case.

Source: Based on the following sample sizes: Birthday n=395, Electronics N=400, Groceries n=394, Travel n=411

Note: Actions ranked high to low based on Birthday Gifts.

Figure 1.10: Post-Purchase Stage

Summary: This figure shows strong substitution effects of agentic commerce during the Post-Purchase stage, focused primarily on tracking shipments. No major difference exists by use case, except lower substitution for Birthday Gifts.

Chart Descriptions:

- **Chart A - Birthday Gifts, Post-purchase Stage:** Grouped bar chart
  - Tracking: 69% baseline (49% Replace in dark blue, 51% Not Replace in light blue)
  - Process Return: 37% baseline (56% Replace in dark blue, 44% Not Replace in light blue)
  - Register Warranty: 32% baseline (55% Replace in dark blue, 45% Not Replace in light blue)
  - Review on Site: 27% baseline (45% Replace in dark blue, 55% Not Replace in light blue)
  - Review on Socials: 18% baseline (50% Replace in dark blue, 50% Not Replace in light blue)
  - Set-up Assistance: 13% baseline (49% Replace in dark blue, 51% Not Replace in light blue)
- **Chart B - Electronics, Post-purchase Stage:** Grouped bar chart
  - Tracking: 69% baseline (49% Replace in dark blue, 51% Not Replace in light blue)
  - Process Return: 32% baseline (39% Replace in dark blue, 61% Not Replace in light blue)
  - Register Warranty: 43% baseline (39% Replace in dark blue, 61% Not Replace in light blue)
  - Review on Site: 29% baseline (37% Replace in dark blue, 63% Not Replace in light blue)
  - Review on Socials: 21% baseline (39% Replace in dark blue, 61% Not Replace in light blue)
  - Set-up Assistance: 20% baseline (39% Replace in dark blue, 61% Not Replace in light blue)
- **Chart C - Groceries, Post-purchase Stage:** Grouped bar chart
  - Tracking: 56% baseline (36% Replace in dark blue, 64% Not Replace in light blue)
  - Process Return: 26% baseline (44% Replace in dark blue, 56% Not Replace in light blue)
  - Register Warranty: 23% baseline (42% Replace in dark blue, 58% Not Replace in light blue)
  - Review on Site: 26% baseline (34% Replace in dark blue, 66% Not Replace in light blue)
  - Review on Socials: 18% baseline (43% Replace in dark blue, 57% Not Replace in light blue)
  - Set-up Assistance: 16% baseline (41% Replace in dark blue, 59% Not Replace in light blue)
- **Chart D - Travel, Post-purchase Stage:** Grouped bar chart
  - Tracking: 56% baseline (32% Replace in dark blue, 68% Not Replace in light blue)
  - Process Return: 38% baseline (35% Replace in dark blue, 65% Not Replace in light blue)
  - Register Warranty: 30% baseline (39% Replace in dark blue, 61% Not Replace in light blue)
  - Review on Site: 33% baseline (44% Replace in dark blue, 56% Not Replace in light blue)
  - Review on Socials: 25% baseline (41% Replace in dark blue, 59% Not Replace in light blue)
  - Set-up Assistance: 24% baseline (43% Replace in dark blue, 57% Not Replace in light blue)

Key Finding: Focused on tracking shipments. No major difference by use case, except lower substitution for Birthday Gift.

Source: Based on the following sample sizes: Birthday n=395, Electronics N=400, Groceries n=394, Travel n=411

Note: Actions ranked high to low based on Birthday Gifts.

Accessibility Notes

1. United States (continued)

Figure 1.11: Most Important Factors

Summary: This figure reveals that shoppers are looking for value and speed, with both price and discounts/promotions considered most important by a majority of consumers.

Chart Descriptions:

- **Chart A - Importance Ranking:** Horizontal bar chart titled "Most important factors when shopping online"
  - Price: 80%
  - Delivery Speed: 71%
  - Ease of Use/Convenience: 63%
  - Discounts and Promotions: 58%
  - Security of transactions: 54%
  - Return Policy: 49%
  - Product Variety: 49%
  - Trusted business: 48%
  - Customer Service: 46%
  - Privacy of my data and purchase history: 42%
  - Control and visibility of online transactions: 35%
  - Personalized recommendations: 16%
  - Automated process for repeat purchases: 13%

Key Finding: Shoppers are looking for value and speed, with both price and discounts/promotions considered most important by a majority.

Source: Agentic Commerce Consumer research survey in US, N=1,600

Figure 1.12: Motivations

Summary: This figure shows that agentic offerings that save shoppers money and time while reducing discovery friction are those most likely to drive adoption.

Chart Description:

- **Chart A - Adoption Motivators:** Horizontal bar chart titled "Which of the following statements would motivate you to use an AI shopping assistant like the one shown above?"
  - Save money through price matching: 39%
  - Find me new products I wouldn't find on my own: 38%
  - Save time: 38%
  - More convenient: 32%
  - Large variety of product options to choose from: 31%
  - Find the best deals: 31%
  - Feels more safe and secure: 16%
  - Other: 1%
  - None of the above: 23%

Key Finding:

- Consumers are most motivated by saving money through price matching (39%), discovering new products (38%), and saving time (38%)
- Consumers were least motivated by the feeling of safety and security, echoing similar sentiments expressed elsewhere in the study (16%)

Source: Agentic Commerce Consumer research survey in US, N=1,600

Figure 1.13: Top Concerns

Summary: This figure identifies data security and privacy as top concerns, followed by accuracy/reliability of purchases. Very few consumers have no concerns. Accuracy/reliability is potentially driven by social media experiences with fake AI or inauthentic images leading to "purchase fails."

Chart Description:

- **Chart A - Concern Levels:** Horizontal bar chart titled "What concerns might you have about using the online shopping agent you were shown?"
  - Data Security: 48%
  - Privacy: 44%
  - Purchase Accuracy: 44%
  - Service Reliability: 40%
  - Lack of Control in Shopping: 37%
  - Lack of Human Support: 37%
  - Cost: 35%
  - Sponsored/Paid Labeling: 25%
  - Processing Returns: 22%
  - Poor Customer Service: 20%
  - Processing Exchanges: 18%
  - Other, please specify: 4%
  - None of the above: 7%

Key Finding: Data security and privacy as top concerns, followed by accuracy/reliability of purchases. Very few have no concerns.

Source: Agentic Commerce Consumer research survey in US, N=1,600

Figure 1.14: Personal Data Sharing

Summary: This figure reveals that consumers are wary to share their personal information, with less than half willing to do so, and even less willing to share financial information. 1 in 4 would not share any information at all.

Chart Description:

- **Chart A - Data Sharing Willingness:** Horizontal bar chart titled "To use this new service, what personal data would you be willing to share with the company offering it?""
  - Personal contact information (full name, email, phone): 45%
  - Home address: 44%
  - Transaction history: 29%
  - Online browsing history: 26%
  - Financial data – credit card number: 26%
  - Financial data – debit card number: 25%
  - Business address: 13%
  - Financial data – bank account number: 13%
  - None of the above: 26% (shown in black bar)

Key Finding: Consumers are wary to share their personal information, with less than half willing to do so, and even less sharing their financial information. 1 in 4 would not share any information at all.

Source: Agentic Commerce Consumer research survey in US, N=1,600

Accessibility Notes

1. United States (continued)

Figure 1.15: Controls and Transparency

Summary: This figure demonstrates that consumer control and transparency over their personal data usage is critical. Only 1 in 5 would still consider using a shopping agent if no control is provided over consumer data usage.

Chart Description:

- **Chart A - Importance of Data Control:** Vertical bar chart titled "When using AI-enabled e-commerce, the AI Agent may be collecting information about your shopping preferences and purchases. How important is it that you can control or delete how the Agent uses your data?"
  - Very important: 62% (dark blue bar)
  - Important: 23% (dark blue bar)
  - Somewhat important: 11% (gray bar)
  - Somewhat not important: 2% (gray bar)
  - Not important at all: 3% (gray bar)
- **Chart B - Likelihood of Using Without Control:** Vertical bar chart titled "If you cannot control how the Agent uses your data, what is the likelihood that you will still use the Agent?"
  - Extremely likely: 9% (dark blue bar)
  - Very likely: 12% (dark blue bar)
  - Somewhat likely: 22% (gray bar)
  - Not very likely: 24% (gray bar)
  - Not at all likely: 33% (gray bar)

Key Finding: Consumer control and transparency over their personal data usage is critical. Only 1 in 5 would still consider using a shopping agent if no control is provided over consumer's data usage.

Source: Agentic Commerce Consumer research survey in US, N=1,600

Figure 1.16: Most Trusted Brands

Summary: This figure shows trusted companies to provide AI include Amazon marketplace, major payment networks (PayPal, Visa), and Apple. GenAI companies, banks, and other Big Tech are less trusted. 1 in 5 consumers would not feel comfortable using a shopping agent from any of these companies.

Chart Description:

- **Chart A - Company Trust Levels:** Horizontal bar chart titled "From which of the following companies would you feel comfortable using the new shopping service you were shown?"
  - Amazon: 53%
  - PayPal: 45%
  - Visa: 34%
  - Apple: 27%
  - OpenAI (ChatGPT): 25%
  - Mastercard: 24%
  - Google (Alphabet): 24%
  - Microsoft: 22%
  - Your primary Bank: 20%
  - Samsung: 19%
  - Meta (Facebook): 13%
  - Amex: 9%
  - IBM: 5%
  - Perplexity: 5%
  - Other, please specify: 1%
  - None of the above: 20%

Key Finding: Trusted Companies to Provide AI: Amazon marketplace, major payment networks (PayPal, Visa) and Apple. GenAI companies, banks, and other Big Tech less trusted. 1 in 5 consumers would not feel comfortable using a shopping agent from any of these companies.

Source: Agentic Commerce Consumer research survey in US, N=1,600

Figure 1.17: Preference for Retailer with Agent

Summary: This figure demonstrates that agents serve as a customer acquisition tool, with 35% of consumers being more likely to shop with a retailer if offering an on-site AI shopping agent.

Chart Description:

- **Chart A - Shopping Likelihood Impact:** Vertical bar chart titled "For those retailers you have not made an online purchase in the last 3 months, would an on-site AI shopping agent make you likely to purchase from them?"
  - More Likely: 35% (dark blue bar)Privacy: 44%
  - Neither more or Less Likely: 42% (gray bar)
  - Less Likely: 23% (gray bar)

Key Finding: Agents as a customer acquisition tool: 35% of consumers are more likely to shop with a retailer if offering on-site AI shopping agent.

Source: Agentic Commerce Consumer research survey in US, N=1,600

Figure 1.18: Online Retailers

Summary: This figure shows that marketplaces Amazon and Walmart are far and away the current winners when looking at where shoppers are currently spending. Single brand retailers Apple and Nike still perform well when compared to multi-brand retailers and marketplaces.

Chart Description:

- **Chart A - Recent Purchase Activity:** Horizontal bar chart titled "From which of the following retailers have you purchased a product or service online in the past 3 months?"
  - Amazon: 85%
  - Walmart: 64%
  - Target: 38%
  - Ebay: 23%
  - Home Depot: 21%
  - Apple: 19%
  - Best Buy: 17%
  - Nike: 16%
  - Etsy: 13%
  - Macy's: 11%
  - Samsung: 8%
  - Other: 8%
  - Wayfair: 6%
  - None of the above: 2%

Key Finding: Marketplaces Amazon and Walmart are far and away the current winners when looking where shoppers are currently spending. Single brand retailers Apple and Nike still perform well when compared to multi-brand retailers and marketplaces.

Source: Agentic Commerce Consumer research survey in US, N=1,600

Accessibility Notes

2. Australia

Figure 2.1: Consumer Familiarity and Usage Frequency

Summary: This figure presents data on consumer awareness and usage of AI-powered shopping assistants in Australia, showing that 59% of online shoppers are familiar with these tools, and among those aware, 36% use them frequently.

Chart Descriptions:

- **Chart A - Familiarity Question:** Bar chart titled "Are you familiar with online shopping assistants or e-commerce experiences enabled by AI?"
  - Yes: 59% (dark blue bar)
  - No: 41% (gray bar)
- **Chart B - Usage Frequency Question:** Bar chart titled "How often do you use digital shopping assistants or an e-commerce experience enabled by AI?"
  - Always: 11% (dark blue bar)
  - Often: 25% (dark blue bar)
  - Sometimes: 33% (dark blue bar)
  - Rarely: 19% (gray bar)
  - Never: 12% (gray bar)

Key Findings:

- ~59% of online shoppers are familiar with some version of online AI-powered shopping assistants already
- 36% of online shoppers familiar with AI-powered assistants often or always use them when shopping

Source: Agentic Commerce Consumer research survey in AUS, N=1,600

Figure 2.2: Generative AI Usage and Shopping Preferences

Summary: This figure shows high penetration of Generative AI usage in Australia, with only 1 in 5 consumers not having used it in the past 3 months. It also reveals consumer preferences regarding businesses that offer AI-powered shopping experiences.

Chart Descriptions:

- **Chart A - Gen AI Chatbot Usage:** Bar chart titled "Have you used any of the currently available Gen AI chatbots in the past 3 months? (top 3 shown)"
  - ChatGPT: 68% (dark blue bar)
  - Gemini: 29% (dark blue bar)
  - Meta AI: 27% (dark blue bar)
  - No, I have not used any of the above: 20% (gray bar)
- **Chart B - Shopping Preference:** Bar chart titled "Would you prefer to shop more or less with businesses that offer an AI-powered shopping assistant experience?"
  - Shop More: 23% (dark blue bar)
  - Shop the same: 62% (gray bar)
  - Shop Less: 15% (gray bar)

Key Findings: With only 1 in 5 having not used Generative AI in the past 3 months, market penetration is already high and growing.

Source: Agentic Commerce Consumer research survey in AUS, N=1,600

Figure 2.3: Substitution Effects

Summary: This figure demonstrates strong substitution effects enabled by agentic commerce across the digital buyer journey stages. Product Discovery actions are more skewed to digital, also showing highest Agentic replacement.

Chart Descriptions:

- **Chart A - Digital vs. In-Person Journey:** Stacked bar chart showing percentage distribution across four journey stages
  - Product Discovery: 92% Digital (dark blue), 8% In-Person only (light blue)
  - Product Evaluation: 88% Digital (dark blue), 12% In-Person only (light blue)
  - Checkout: 90% Digital (dark blue), 10% In-Person only (light blue)
  - Post Purchase: 86% Digital (dark blue), 14% In-Person only (light blue)
- **Chart B - Agentic Replacement of Digital Journey:** Stacked bar chart showing replacement vs. non-replacement percentages
  - Product Discovery: 74% Replacement (dark blue), 26% Non-Replacement (light blue) - 92% Digital Base
  - Product Evaluation: 70% Replacement (dark blue), 30% Non-Replacement (light blue) - 88% Digital Base
  - Checkout: 62% Replacement (dark blue), 38% Non-Replacement (light blue) - 90% Digital Base
  - Post Purchase: 66% Replacement (dark blue), 34% Non-Replacement (light blue) - 86% Digital Base

Key Finding: Product Discovery actions are more skewed to digital, also showing highest Agentic replacement.

Source: Agentic Commerce Consumer research survey in AUS, N=1,600

Note: *Average across 4 product categories: Groceries, Electronics, Travel, Gifts. **Agentic Replacement rate based on top digital action by stage of the buyer journey.

Figure 2.4: Use Cases Comparison

Summary: This figure shows that across shopping categories (Birthday Gifts and Electronics), digital penetration and agentic replacement remain consistently high throughout all journey stages.

Chart Descriptions:

- **Chart A - Birthday Gifts, Digital vs. In-Person Journey:** Stacked bar chart
  - Product Discovery: 94% Digital (dark blue), 6% In-Person (light blue)
  - Product Evaluation: 91% Digital (dark blue), 9% In-Person (light blue)
  - Checkout: 92% Digital (dark blue), 8% In-Person (light blue)
  - Post Purchase: 91% Digital (dark blue), 9% In-Person (light blue)
- **Chart B - Birthday Gifts, Agentic Replacement:** Stacked bar chart
  - Product Discovery: 69% Replacement (dark blue), 31% Non-Replacement (light blue)
  - Product Evaluation: 72% Replacement (dark blue), 28% Non-Replacement (light blue)
  - Checkout: 61% Replacement (dark blue), 39% Non-Replacement (light blue)
  - Post Purchase: 77% Replacement (dark blue), 23% Non-Replacement (light blue)
- **Chart C - Electronics, Digital vs. In-Person Journey:** Stacked bar chart
  - Product Discovery: 95% Digital (dark blue), 5% In-Person (light blue)
  - Product Evaluation: 91% Digital (dark blue), 9% In-Person (light blue)
  - Checkout: 92% Digital (dark blue), 8% In-Person (light blue)
  - Post Purchase: 92% Digital (dark blue), 8% In-Person (light blue)
- **Chart D - Electronics, Agentic Replacement:** Stacked bar chart
  - Product Discovery: 76% Replacement (dark blue), 24% Non-Replacement (light blue)
  - Product Evaluation: 75% Replacement (dark blue), 25% Non-Replacement (light blue)
  - Checkout: 69% Replacement (dark blue), 31% Non-Replacement (light blue)
  - Post Purchase: 63% Replacement (dark blue), 37% Non-Replacement (light blue)

Source: Agentic Commerce Consumer research survey in AUS; Birthday Gifts N=401, Electronics N=397

Note: **Agentic Replacement rate based on top digital action by stage of the buyer journey.

Accessibility Notes

2. Australia (continued)

Figure 2.5: Additional Use Cases

Summary: This figure demonstrates that digital penetration and agentic replacement are strong across all parts of the buyer journey for both Groceries and Travel categories.

Chart Descriptions:

- **Chart A - Groceries, Digital vs. In-Person Journey:** Stacked bar chart
  - Product Discovery: 83% Digital (dark blue), 17% In-Person (light blue)
  - Product Evaluation: 77% Digital (dark blue), 23% In-Person (light blue)
  - Checkout: 85% Digital (dark blue), 15% In-Person (light blue)
  - Post Purchase: 76% Digital (dark blue), 24% In-Person (light blue)
- **Chart B - Groceries, Agentic Replacement:** Stacked bar chart
  - Product Discovery: 71% Replacement (dark blue), 29% Non-Replacement (light blue)
  - Product Evaluation: 73% Replacement (dark blue), 27% Non-Replacement (light blue)
  - Checkout: 61% Replacement (dark blue), 39% Non-Replacement (light blue)
  - Post Purchase: 66% Replacement (dark blue), 34% Non-Replacement (light blue)
- **Chart C - Travel, Digital vs. In-Person Journey:** Stacked bar chart
  - Product Discovery: 97% Digital (dark blue), 3% In-Person (light blue)
  - Product Evaluation: 92% Digital (dark blue), 8% In-Person (light blue)
  - Checkout: 89% Digital (dark blue), 11% In-Person (light blue)
  - Post Purchase: 85% Digital (dark blue), 15% In-Person (light blue)
- **Chart D - Travel, Agentic Replacement:** Stacked bar chart
  - Product Discovery: 74% Replacement (dark blue), 26% Non-Replacement (light blue)
  - Product Evaluation: 69% Replacement (dark blue), 31% Non-Replacement (light blue)
  - Checkout: 63% Replacement (dark blue), 37% Non-Replacement (light blue)
  - Post Purchase: 68% Replacement (dark blue), 32% Non-Replacement (light blue)

Source: Agentic Commerce Consumer research survey in AUS; Groceries N=401, Travel N=401

Note: **Agentic Replacement rate based on top digital action by stage of the buyer journey.

Figure 2.6: Agent Usage Frequency

Summary: This figure shows anticipated usage patterns for AI-enabled e-commerce experiences, with three in five respondents seeing themselves using an AI agent at least a few times per month, while fewer than 1 in 5 foresee no use at all.

Chart Descriptions:

- **Chart A - Usage Frequency Projection:** Bar chart titled "How often do you see yourself using the e-commerce experience enabled by AI shown if available?"
  - Daily: 9% (dark blue bar)
  - Weekly: 20% (dark blue bar)
  - A few times per month: 28% (dark blue bar)
  - A few times per year: 18% (gray bar)
  - Once a year or fewer: 9% (gray bar)
  - Never: 17% (gray bar)

Key Findings: Three in five respondents see themselves using an AI agent at least a few times per month, while fewer than 1 in 5 foresee no use at all.

Source: Agentic Commerce Consumer research survey in AUS: N=1600

Accessibility Notes

2. Australia (continued)

Figure 2.7: Product Discovery Stage

Summary: This figure illustrates strong substitution effects of agentic commerce during the Product Discovery stage. The key finding notes that this stage is mainly focused on Google search and Business website search, more salient in the Travel and Home Entertainment use cases. Online Marketplace discovery is more prevalent for Birthday gift.

Chart Descriptions:

- **Chart A - Birthday Gifts, Product Discovery Stage:** Grouped bar chart with baseline percentage and replacement split
  - Search Engine: 63% baseline (26% Replace in dark blue, 74% Not Replace in light blue)
  - Online Marketplace: 54% baseline (30% Replace in dark blue, 70% Not Replace in light blue)
  - Business Website: 48% baseline (41% Replace in dark blue, 59% Not Replace in light blue)
  - Social Media: 38% baseline (31% Replace in dark blue, 69% Not Replace in light blue)
  - Online Ads: 32% baseline (40% Replace in dark blue, 60% Not Replace in light blue)
- **Chart B - Electronics, Product Discovery Stage:** Grouped bar chart
  - Search Engine: 71% baseline (24% Replace in dark blue, 76% Not Replace in light blue)
  - Online Marketplace: 47% baseline (37% Replace in dark blue, 63% Not Replace in light blue)
  - Business Website: 54% baseline (33% Replace in dark blue, 67% Not Replace in light blue)
  - Social Media: 35% baseline (39% Replace in dark blue, 61% Not Replace in light blue)
  - Online Ads: 29% baseline (40% Replace in dark blue, 60% Not Replace in light blue)
- **Chart C - Groceries, Product Discovery Stage:** Grouped bar chart
  - Search Engine: 50% baseline (29% Replace in dark blue, 71% Not Replace in light blue)
  - Online Marketplace: 35% baseline (35% Replace in dark blue, 65% Not Replace in light blue)
  - Business Website: 47% baseline (41% Replace in dark blue, 59% Not Replace in light blue)
  - Social Media: 27% baseline (40% Replace in dark blue, 60% Not Replace in light blue)
  - Online Ads: 24% baseline (44% Replace in dark blue, 56% Not Replace in light blue)
- **Chart D - Travel, Product Discovery Stage:** Grouped bar chart
  - Search Engine: 71% baseline (26% Replace in dark blue, 74% Not Replace in light blue)
  - Online Marketplace: 32% baseline (37% Replace in dark blue, 63% Not Replace in light blue)
  - Business Website: 52% baseline (34% Replace in dark blue, 66% Not Replace in light blue)
  - Social Media: 36% baseline (37% Replace in dark blue, 63% Not Replace in light blue)
  - Online Ads: 34% baseline (40% Replace in dark blue, 60% Not Replace in light blue)

Key Finding: Mainly focused on Google search and Business website search, more salient in the Travel and Home Entertainment use cases. Online Marketplace discovery more prevalent for Birthday gift.

Source: *Actions ranked high to low based on Birthday Gifts Based on the following sample sizes: Birthday n=401, Home Ent. N=397, Groceries n=401, Travel n=401

Figure 2.8: Product Evaluation Stage

Summary: This figure shows strong substitution effects of agentic commerce during the Product Evaluation stage, which enables comparison across different retailers and facilitates expert reviews.

Chart Descriptions:

- **Chart A - Birthday Gifts, Product Evaluation Stage:** Grouped bar chart
  - Browser Different Retailers: 53% baseline (39% Replace in dark blue, 61% Not Replace in light blue)
  - Read Web Reviews: 43% baseline (39% Replace in dark blue, 61% Not Replace in light blue)
  - Read Social Media: 39% baseline (41% Replace in dark blue, 59% Not Replace in light blue)
  - Browse Same Retailer: 38% baseline (35% Replace in dark blue, 65% Not Replace in light blue)
  - Read Journalists: 32% baseline (42% Replace in dark blue, 58% Not Replace in light blue)
  - Support via Email: 16% baseline (50% Replace in dark blue, 50% Not Replace in light blue)
  - Support via Phone: 11% baseline (42% Replace in dark blue, 58% Not Replace in light blue)
- **Chart B - Home Entertainment, Product Evaluation Stage:** Grouped bar chart
  - Browser Different Retailers: 52% baseline (25% Replace in dark blue, 75% Not Replace in light blue)
  - Read Web Reviews: 46% baseline (42% Replace in dark blue, 58% Not Replace in light blue)
  - Read Social Media: 45% baseline (35% Replace in dark blue, 70% Not Replace in light blue)
  - Browse Same Retailer: 35% baseline (27% Replace in dark blue, 73% Not Replace in light blue)
  - Read Journalists: 33% baseline (38% Replace in dark blue, 62% Not Replace in light blue)
  - Support via Email: 16% baseline (41% Replace in dark blue, 59% Not Replace in light blue)
  - Support via Phone: 12% baseline (38% Replace in dark blue, 62% Not Replace in light blue)
- **Chart C - Groceries, Product Evaluation Stage:** Grouped bar chart
  - Browser Different Retailers: 38% baseline (32% Replace in dark blue, 68% Not Replace in light blue)
  - Read Web Reviews: 28% baseline (46% Replace in dark blue, 54% Not Replace in light blue)
  - Read Social Media: 29% baseline (37% Replace in dark blue, 63% Not Replace in light blue)
  - Browse Same Retailer: 34% baseline (36% Replace in dark blue, 64% Not Replace in light blue)
  - Read Journalists: 23% baseline (27% Replace in dark blue, 73% Not Replace in light blue)
  - Support via Email: 14% baseline (41% Replace in dark blue, 59% Not Replace in light blue)
  - Support via Phone: 13% baseline (44% Replace in dark blue, 56% Not Replace in light blue)
- **Chart D - Travel Booking, Product Evaluation Stage:** Grouped bar chart
  - Browser Different Retailers: 54% baseline (32% Replace in dark blue, 68% Not Replace in light blue)
  - Read Web Reviews: 44% baseline (40% Replace in dark blue, 60% Not Replace in light blue)
  - Read Social Media: 37% baseline (31% Replace in dark blue, 69% Not Replace in light blue)
  - Browse Same Retailer: 38% baseline (42% Replace in dark blue, 58% Not Replace in light blue)
  - Read Journalists: 27% baseline (40% Replace in dark blue, 60% Not Replace in light blue)
  - Support via Email: 22% baseline (37% Replace in dark blue, 63% Not Replace in light blue)
  - Support via Phone: 19% baseline (36% Replace in dark blue, 64% Not Replace in light blue)

Key Finding: Enables comparison across different retailers, facilitates expert reviews.

Source: *Actions ranked high to low based on Birthday Gifts Based on the following sample sizes: Birthday n=401, Home Ent. N=397, Groceries n=401, Travel n=401

Accessibility Notes

2. Australia (continued)

Figure 2.9: Cart Selection Stage

Summary: This figure demonstrates strong substitution effects of agentic commerce during the Cart Selection stage, which is more prevalent for adding product to cart and providing address and payment details. No major difference by use case.

Chart Descriptions:

- **Chart A - Birthday Gifts, Cart Selection Stage:** Grouped bar chart
  - Add to cart: 62% baseline (42% Replace in dark blue, 58% Not Replace in light blue)
  - Provide address: 61% baseline (40% Replace in dark blue, 60% Not Replace in light blue)
  - Payment details: 57% baseline (47% Replace in dark blue, 53% Not Replace in light blue)
  - Discount codes: 49% baseline (36% Replace in dark blue, 64% Not Replace in light blue)
  - Buy-it-Now: 32% baseline (48% Replace in dark blue, 52% Not Replace in light blue)
  - Memberships: 30% baseline (47% Replace in dark blue, 53% Not Replace in light blue)
- **Chart B - Electronics, Cart Selection Stage:** Grouped bar chart
  - Add to cart: 61% baseline (36% Replace in dark blue, 64% Not Replace in light blue)
  - Provide address: 56% baseline (41% Replace in dark blue, 59% Not Replace in light blue)
  - Payment details: 57% baseline (38% Replace in dark blue, 62% Not Replace in light blue)
  - Discount codes: 43% baseline (40% Replace in dark blue, 60% Not Replace in light blue)
  - Buy-it-Now: 38% baseline (42% Replace in dark blue, 58% Not Replace in light blue)
  - Memberships: 30% baseline (31% Replace in dark blue, 69% Not Replace in light blue)
- **Chart C - Groceries, Cart Selection Stage:** Grouped bar chart
  - Add to cart: 58% baseline (44% Replace in dark blue, 56% Not Replace in light blue)
  - Provide address: 52% baseline (43% Replace in dark blue, 57% Not Replace in light blue)
  - Payment details: 51% baseline (44% Replace in dark blue, 56% Not Replace in light blue)
  - Discount codes: 33% baseline (40% Replace in dark blue, 60% Not Replace in light blue)
  - Buy-it-Now: 29% baseline (39% Replace in dark blue, 61% Not Replace in light blue)
  - Memberships: 32% baseline (45% Replace in dark blue, 55% Not Replace in light blue)
- **Chart D - Travel Booking, Cart Selection Stage:** Grouped bar chart
  - Add to cart: 51% baseline (39% Replace in dark blue, 61% Not Replace in light blue)
  - Provide address: 49% baseline (40% Replace in dark blue, 60% Not Replace in light blue)
  - Payment details: 55% baseline (45% Replace in dark blue, 55% Not Replace in light blue)
  - Discount codes: 43% baseline (37% Replace in dark blue, 63% Not Replace in light blue)
  - Buy-it-Now: 30% baseline (40% Replace in dark blue, 60% Not Replace in light blue)
  - Memberships: 34% baseline (37% Replace in dark blue, 63% Not Replace in light blue)

Key Finding: More prevalent for adding product to cart and providing address and payment details. No major difference by use case.

Source: *Actions ranked high to low based on Birthday Gifts Based on the following sample sizes: Birthday n=401, Home Ent. N=397, Groceries n=401, Travel n=401

Figure 2.10: Post-Purchase Stage

Summary: This figure shows strong substitution effects of agentic commerce during the Post-Purchase stage, focused on tracking shipments and registering warranties. No major difference by use case, except lower substitution for Birthday Gift.

Chart Descriptions:

- **Chart A - Birthday Gifts, Post-purchase Stage:** Grouped bar chart
  - Tracking: 66% baseline (50% Replace in dark blue, 50% Not Replace in light blue)
  - Process return: 37% baseline (57% Replace in dark blue, 43% Not Replace in light blue)
  - Register warranty: 31% baseline (40% Replace in dark blue, 60% Not Replace in light blue)
  - Submit review on-site: 28% baseline (43% Replace in dark blue, 57% Not Replace in light blue)
  - Publish review social: 23% baseline (51% Replace in dark blue, 49% Not Replace in light blue)
  - Set-up assistance: 15% baseline (40% Replace in dark blue, 60% Not Replace in light blue)
- **Chart B - Home Entertainment, Post-purchase Stage:** Grouped bar chart
  - Tracking: 68% baseline (39% Replace in dark blue, 61% Not Replace in light blue)
  - Process return: 32% baseline (39% Replace in dark blue, 61% Not Replace in light blue)
  - Register warranty: 43% baseline (39% Replace in dark blue, 61% Not Replace in light blue)
  - Submit review on-site: 29% baseline (37% Replace in dark blue, 63% Not Replace in light blue)
  - Publish review social: 21% baseline (39% Replace in dark blue, 61% Not Replace in light blue)
  - Set-up assistance: 20% baseline (39% Replace in dark blue, 61% Not Replace in light blue)
- **Chart C - Groceries, Post-purchase Stage:** Grouped bar chart
  - Tracking: 56% baseline (36% Replace in dark blue, 64% Not Replace in light blue)
  - Process return: 26% baseline (44% Replace in dark blue, 56% Not Replace in light blue)
  - Register warranty: 23% baseline (42% Replace in dark blue, 58% Not Replace in light blue)
  - Submit review on-site: 26% baseline (34% Replace in dark blue, 66% Not Replace in light blue)
  - Publish review social: 18% baseline (43% Replace in dark blue, 57% Not Replace in light blue)
  - Set-up assistance: 16% baseline (41% Replace in dark blue, 59% Not Replace in light blue)
- **Chart D - Travel, Post-purchase Stage:** Grouped bar chart
  - Tracking: 56% baseline (32% Replace in dark blue, 68% Not Replace in light blue)
  - Process Return: 38% baseline (35% Replace in dark blue, 65% Not Replace in light blue)
  - Register warranty: 30% baseline (39% Replace in dark blue, 61% Not Replace in light blue)
  - Submit review on-site: 33% baseline (44% Replace in dark blue, 56% Not Replace in light blue)
  - Publish review social: 25% baseline (41% Replace in dark blue, 59% Not Replace in light blue)
  - Set-up assistance: 24% baseline (43% Replace in dark blue, 57% Not Replace in light blue)

Key Finding: Focused on tracking shipments and registering warranties. No major difference by use case, except lower substitution for Birthday Gift.

Source: *Actions ranked high to low based on Birthday Gifts Based on the following sample sizes: Birthday n=401, Home Ent. N=397, Groceries n=401, Travel n=401

Accessibility Notes

2. Australia (continued)

Figure 2.11: Most Important Factors

Summary: This figure reveals that shoppers are looking for value and speed, with both price and discounts/promotions considered most important by a majority of consumers.

Chart Descriptions:

- **Chart A - Importance Ranking:** Horizontal bar chart titled "Most important factors when shopping online"
  - Price: 74%
  - Delivery Speed: 61%
  - Security of transactions: 57%
  - Ease of Use/Convenience: 54%
  - Discounts and Promotions: 51%
  - Trusted business: 48%
  - Privacy of my data and purchase history: 41%
  - Return Policy: 40%
  - Customer Service: 39%
  - Product Variety: 37%
  - Control and visibility of online transactions: 30%
  - Personalised recommendations: 15%
  - Automated process for repeat purchases: 12%

Key Finding: Shoppers are looking for value and speed, with both price and discounts/promotions considered most important by a majority.

Source: Agentic Commerce Consumer research survey in AUS, N=1,600

Figure 2.12: Motivations

Summary: This figure shows that agentic offerings that save shoppers money and time while reducing discovery friction are those most likely to drive adoption.

Chart Description:

- **Chart A - Adoption Motivators:** Horizontal bar chart titled "Which of the following statements would motivate you to use an AI shopping assistant like the one shown above?"
  - Save time: 45%
  - Save money through price matching: 42%
  - Find me new products I wouldn't find on my own: 40%
  - Large variety of product options to choose from: 35%
  - Fine the best deals: 34%
  - More convenient: 32%
  - Feels more safe and secure: 21%
  - Other: 1%
  - None of the Above: 16%

Key Finding:

- Consumers are most motivated by the time-saving benefits (45%) and discovery of new products (40%) offered by AI shopping assistants
- Trust in finding the best deals (34%) and access to a wider product variety (35%) also rank high, while emotional factors such as safety and security (21%) play a more limited role in driving adoption

Source: Agentic Commerce Consumer research survey in AUS, N=1,600

Figure 2.13: Top Concerns

Summary: This figure identifies data security and privacy as top concerns, followed by accuracy/reliability of purchases (likely driven by past fails on Social commerce). Very few have no concerns.

Chart Description:

- **Chart A - Concern Levels:** Horizontal bar chart titled "What concerns might you have about using the online shopping agent you were shown?"
  - Data Security: 52%
  - Privacy: 44%
  - Reliability of service: 40%
  - Accuracy of Purchases: 40%
  - Lack of control of the shopping process: 35%
  - Cost: 31%
  - Not able to talk to a real person for customer service: 31%
  - Sponsored or paid recommendations not clearly…: 25%
  - Not being able to process returns: 19%
  - Poor customer service: 18%
  - Not being able to process exchanges: 17%
  - Other, please specify: 2%
  - None of the above: 6%

Key Finding: Data security and privacy as top concerns, followed by accuracy/reliability of purchases (likely driven by past fails on Social commerce). Very few have no concerns.

Source: Agentic Commerce Consumer research survey in AUS, n=1,600

Figure 2.14: Personal Data Sharing

Summary: This figure reveals that consumers are wary to share their personal information, with less than half willing to do so, and even less sharing their financial information. 1 in 5 would not share any information at all.

Chart Description:

- **Chart A - Data Sharing Willingness:** Horizontal bar chart titled "To use this new service, what personal data would you be willing to share with the company offering it?""
  - Personal contact information (full name, email, phone): 44%
  - Home address: 40%
  - Transaction history: 25%
  - Online browsing history: 25%
  - Financial data – debit card number: 24%
  - Financial data – credit card number: 20%
  - Business address: 18%
  - Financial data – bank account number: 16%
  - None of the above: 22% (shown in black bar)

Key Finding: Consumers are wary to share their personal information, with less than half willing to do so, and even less sharing their financial information. 1 in 5 would not share any information at all.

Source: Agentic Commerce Consumer research survey in AUS, n=1,600

Accessibility Notes

2. Australia (continued)

Figure 2.15: Controls and Transparency

Summary: This figure demonstrates that shoppers widely agree with 85% saying consumer controls and transparency over personal data usage is critical. Only 1 in 4 would still consider using a shopping agent if no control is provided over consumer's data usage.

Chart Description:

- **Chart A - Importance of Data Control:** Vertical bar chart titled "When using AI-enabled e-commerce, the AI Agent may be collecting information about your shopping preferences and purchases. How important is it that you can control or delete how the Agent uses your data?"
  - Very important: 58% (dark blue bar)
  - Important: 28% (dark blue bar)
  - Somewhat important: 12% (gray bar)
  - Somewhat not important: 2% (gray bar)
  - Not important at all: 1% (gray bar)
- **Chart B - Likelihood of Using Without Control:** Vertical bar chart titled "If you cannot control how the Agent uses your data, what is the likelihood that you will still use the Agent?"
  - Extremely likely: 11% (dark blue bar)
  - Very likely: 17% (dark blue bar)
  - Somewhat likely: 22% (gray bar)
  - Not very likely: 27% (gray bar)
  - Not at all likely: 24% (gray bar)

Key Finding: Shoppers widely agree with 85% saying consumer controls and transparency over personal data usage is critical. Only 1 in 4 would still consider using a shopping agent if no control is provided over consumer's data usage.

Source: Agentic Commerce Consumer research survey in AUS, n=1,600

Figure 2.16: Most Trusted Brands

Summary: This figure shows trusted companies to provide AI include major payment networks, Amazon marketplace, and Apple. GenAI companies, banks, and other Big Tech less trusted.

Chart Description:

- **Chart A - Company Trust Levels:** Horizontal bar chart titled "From which of the following companies would you feel comfortable using the new shopping service you were shown?"
  - PayPal: 48%
  - Amazon: 37%
  - Mastercard: 37%
  - Visa: 36%
  - Apple: 35%
  - OpenAI (ChatGPT): 29%
  - Microsoft: 25%
  - Samsung: 24%
  - Google (Alphabet): 21%
  - Your primary Bank: 20%
  - Meta (Facebook): 15%
  - Amex: 8%
  - IBM: 7%
  - Perplexity: 5%
  - Other, please specify: 0%
  - None of the above: 13%

Key Finding: Trusted Companies to Provide AI: major payment networks, Amazon marketplace, and Apple. GenAI companies, banks, and other Big Tech less trusted.

Source: Agentic Commerce Consumer research survey in AUS, N=1,600

Figure 2.17: Preference for Retailer with Agent

Summary: This figure demonstrates that agents serve as a customer acquisition tool, with 44% of consumers being more likely to shop with a retailer if offering an on-site AI shopping agent.

Chart Description:

- **Chart A - Shopping Likelihood Impact:** Vertical bar chart titled "For those retailers you have not made an online purchase in the last 3 months, would an on-site AI shopping agent make you likely to purchase from them?"
  - More Likely: 44% (dark blue bar)
  - Neither more or Less Likely: 38% (gray bar)
  - Less Likely: 18% (gray bar)

Key Finding: Agents as a customer acquisition tool: 44% of consumers are more likely to shop with a retailer if offering on-site AI shopping agent.

Source: Agentic Commerce Consumer research survey in AUS, N=1,600

Figure 2.18: Online Retailers

Summary: This figure shows that multi-brand retailers with a strong online presence lead in Australia.

Chart Description:

- **Chart A - Recent Purchase Activity:** Horizontal bar chart titled "From which of the following retailers have you purchased a product or service online in the past 3 months?"
  - Woolworths: 57%
  - Coles: 51%
  - Kmart: 49%
  - Big W: 37%
  - JB Hi-Fi: 32%
  - Bunnings Warehouse: 30%
  - ALDI: 27%
  - Officeworks: 26%
  - Myer: 21%
  - Harvey Norman: 14%
  - Other: 9%
  - N/A: 7%

Key Finding: Multi-brand retailers with a strong online presence lead in Australia.

Source: Agentic Commerce Consumer research survey in AUS, N=1,600

Accessibility Notes

3. New Zealand

Figure 3.1: Consumer Familiarity and Usage Frequency

Summary: This figure presents data on consumer awareness and usage of AI-powered shopping assistants in New Zealand, showing that less than half of shoppers surveyed are familiar with online AI shopping assistants currently.

Chart Descriptions:

- **Chart A - Familiarity Question:** Bar chart titled "Are you familiar with online shopping assistants or e-commerce experiences enabled by AI?"
  - Yes: 43% (dark blue bar)
  - No: 57% (gray bar)
- **Chart B - Usage Frequency Question:** Bar chart titled "How often do you use digital shopping assistants or an e-commerce experience enabled by AI?"
  - Always: 7% (dark blue bar)
  - Often: 16% (dark blue bar)
  - Sometimes: 36% (dark blue bar)
  - Rarely: 26% (gray bar)
  - Never: 14% (gray bar)

Key Findings:

- Only 43% of online shoppers are familiar with some version of online AI-powered shopping assistants already
- 23% of online shoppers familiar with AI-powered assistants often or always use them when shopping

Source: Agentic Commerce Consumer research survey in NZ, N=500

Figure 3.2: Gen AI Usage and Shopping Preferences

Summary: This figure shows that there is still room for Gen AI adoption in NZ, with nearly 30% of shoppers having not used any of the currently available Gen AI offerings in the past 3 mo.

Chart Descriptions:

- **Chart A - Gen AI Chatbot Usage:** Bar chart titled "Have you used any of the currently available Gen AI chatbots in the past 3 months? (top 3 shown)"
  - ChatGPT: 57% (dark blue bar)
  - Meta AI: 29% (dark blue bar)
  - Gemini: 24% (dark blue bar)
  - No, I have not used any of the above: 29% (gray bar)
- **Chart B - Shopping Preference:** Bar chart titled "Would you prefer to shop more or less with businesses that offer an AI-powered shopping assistant experience?"
  - Shop More: 13% (dark blue bar)
  - Shop the same: 66% (gray bar)
  - Shop Less: 21% (gray bar)

Key Findings: There is still room for Gen AI adoption in NZ, with nearly 30% of shoppers having not used any of the currently available Gen AI offerings in the past 3 mo.

Source: Agentic Commerce Consumer research survey in NZ, N=500

Figure 3.3: Digital vs In-Person and Agentic Replacement

Summary: This figure demonstrates strong substitution effects enabled by agentic commerce across the digital buyer journey stages. Product Discovery actions are more skewed to digital, also showing highest Agentic replacement.

Chart Descriptions:

- **Chart A - In-Person vs. Digital:** Stacked bar chart showing percentage distribution across four journey stages
  - Product Discovery: 93% Digital (dark blue), 7% In-Person only (light blue)
  - Product Evaluation: 89% Digital (dark blue), 11% In-Person only (light blue)
  - Checkout: 88% Digital (dark blue), 12% In-Person only (light blue)
  - Post Purchase: 85% Digital (dark blue), 15% In-Person only (light blue)
- **Chart B - Agentic Replacement of Digital Journey:** Stacked bar chart showing replacement vs. non-replacement percentages
  - Product Discovery: 71% Replacement (dark blue), 29% Non-Replacement (light blue) - 93% Digital Base
  - Product Evaluation: 61% Replacement (dark blue), 39% Non-Replacement (light blue) - 89% Digital Base
  - Checkout: 66% Replacement (dark blue), 34% Non-Replacement (light blue) - 88% Digital Base
  - Post Purchase: 59% Replacement (dark blue), 41% Non-Replacement (light blue) - 85% Digital Base

Key Finding: Product Discovery actions are more skewed to digital, also showing highest Agentic replacement..

Source: Agentic Commerce Consumer research survey in NZ, N=500

Note: *Average across 4 product categories: Groceries, Electronics, Travel, Gifts. **Agentic Replacement rate based on top digital action by stage of the buyer journey.

Figure 3.4: Use Cases Comparison

Summary: This figure shows that across shopping categories (Birthday Gifts and Electronics), digital penetration and agentic replacement remain consistently high throughout all journey stages.

Chart Descriptions:

- **Chart A - Birthday Gifts, Digital vs. In-Person Journey:** Stacked bar chart
  - Product Discovery: 96% Digital (dark blue), 4% In-Person (light blue)
  - Product Evaluation: 91% Digital (dark blue), 9% In-Person (light blue)
  - Checkout: 90% Digital (dark blue), 10% In-Person (light blue)
  - Post Purchase: 91% Digital (dark blue), 9% In-Person (light blue)
- **Chart B - Birthday Gifts, Agentic Replacement:** Stacked bar chart
  - Product Discovery: 71% Replacement (dark blue), 29% Non-Replacement (light blue)
  - Product Evaluation: 61% Replacement (dark blue), 39% Non-Replacement (light blue)
  - Checkout: 66% Replacement (dark blue), 34% Non-Replacement (light blue)
  - Post Purchase: 59% Replacement (dark blue), 41% Non-Replacement (light blue)
- **Chart C - Electronics, Digital vs. In-Person Journey:** Stacked bar chart
  - Product Discovery: 92% Digital (dark blue), 8% In-Person (light blue)
  - Product Evaluation: 94% Digital (dark blue), 6% In-Person (light blue)
  - Checkout: 89% Digital (dark blue), 11% In-Person (light blue)
  - Post Purchase: 91% Digital (dark blue), 9% In-Person (light blue)

Chart D - Electronics, Agentic Replacement: Stacked bar chart

- Product Discovery: 73% Replacement (dark blue), 27% Non-Replacement (light blue)
- Product Evaluation: 78% Replacement (dark blue), 22% Non-Replacement (light blue)
- Checkout: 69% Replacement (dark blue), 31% Non-Replacement (light blue)
- Post Purchase: 66% Replacement (dark blue), 34% Non-Replacement (light blue)

Source: Agentic Commerce Consumer research survey in NZ; Birthday Gifts N=124, Electronics N=126

Note: **Agentic Replacement rate based on top digital action by stage of the buyer journey.

Accessibility Notes

3. New Zealand (continued)

Figure 3.5: Additional Use Cases

Summary: This figure demonstrates that digital penetration and agentic replacement are strong across all parts of the buyer journey for both Groceries and Travel categories.

Chart Descriptions:

- **Chart A - Groceries, Digital vs. In-Person Journey:** Stacked bar chart
  - Product Discovery: 86% Digital (dark blue), 14% In-Person (light blue)
  - Product Evaluation: 78% Digital (dark blue), 22% In-Person (light blue)
  - Checkout: 82% Digital (dark blue), 18% In-Person (light blue)
  - Post Purchase: 72% Digital (dark blue), 28% In-Person (light blue)
- **Chart B - Groceries, Agentic Replacement:** Stacked bar chart
  - Product Discovery: 71% Replacement (dark blue), 29% Non-Replacement (light blue)
  - Product Evaluation: 83% Replacement (dark blue), 17% Non-Replacement (light blue)
  - Checkout: 73% Replacement (dark blue), 28% Non-Replacement (light blue)
  - Post Purchase: 89% Replacement (dark blue), 11% Non-Replacement (light blue)
- **Chart C - Travel, Digital vs. In-Person Journey:** Stacked bar chart
  - Product Discovery: 97% Digital (dark blue), 3% In-Person (light blue)
  - Product Evaluation: 92% Digital (dark blue), 8% In-Person (light blue)
  - Checkout: 92% Digital (dark blue), 8% In-Person (light blue)
  - Post Purchase: 85% Digital (dark blue), 15% In-Person (light blue)
- **Chart D - Travel, Agentic Replacement:** Stacked bar chart
  - Product Discovery: 67% Replacement (dark blue), 33% Non-Replacement (light blue)
  - Product Evaluation: 74% Replacement (dark blue), 26% Non-Replacement (light blue)
  - Checkout: 56% Replacement (dark blue), 44% Non-Replacement (light blue)
  - Post Purchase: 65% Replacement (dark blue), 35% Non-Replacement (light blue)

Source: Agentic Commerce Consumer research survey in NZ; Groceries N=125, Travel N=125

Note: **Agentic Replacement rate based on top digital action by stage of the buyer journey.

Figure 3.6: Agent Usage Frequency

Summary: This figure shows anticipated usage patterns for AI-enabled e-commerce experiences, with nearly half of all respondents seeing themselves using an AI agent at least a few times per month, while only 1 in 5 foresee no use at all.

Chart Descriptions:

- **Chart A - Usage Frequency Projection:** Bar chart titled "How often do you see yourself using the e-commerce experience enabled by AI shown if available?"
  - Daily: 5% (dark blue bar)
  - Weekly: 16% (dark blue bar)
  - A few times per month: 26% (dark blue bar)
  - A few times per year: 24% (gray bar)
  - Once a year or fewer: 8% (gray bar)
  - Never: 21% (gray bar)

Key Findings: Nearly half of all respondents see themselves using an AI agent at least a few times per month, while only 1 in 5 foresee no use at all.

Source: Agentic Commerce Consumer research survey in NZ, N=1600

Accessibility Notes

3. New Zealand (continued)

Figure 3.7: Product Discovery Stage

Summary: This figure illustrates strong substitution effects of agentic commerce during the Product Discovery stage. The key finding notes that this stage is mainly focused on Google search and Business website search, more salient in the Electronics and Groceries use cases. Online Marketplace discovery more prevalent for Birthday gift.

Chart Descriptions:

- **Chart A - Birthday Gifts, Product Discovery Stage:** Grouped bar chart with baseline percentage and replacement split
  - Search Engine: 73% baseline (29% Replace in dark blue, 71% Not Replace in light blue)
  - Online Marketplace: 55% baseline (46% Replace in dark blue, 54% Not Replace in light blue)
  - Business Website: 48% baseline (40% Replace in dark blue, 60% Not Replace in light blue)
  - Social Media: 37% baseline (48% Replace in dark blue, 52% Not Replace in light blue)
  - Online Ads: 23% baseline (43% Replace in dark blue, 57% Not Replace in light blue)
- **Chart B - Electronics, Product Discovery Stage:** Grouped bar chart
  - Search Engine: 71% baseline (24% Replace in dark blue, 76% Not Replace in light blue)
  - Online Marketplace: 47% baseline (37% Replace in dark blue, 63% Not Replace in light blue)
  - Business Website: 57% baseline (29% Replace in dark blue, 71% Not Replace in light blue)
  - Social Media: 31% baseline (49% Replace in dark blue, 51% Not Replace in light blue)
  - Online Ads: 33% baseline (46% Replace in dark blue, 54% Not Replace in light blue)
- **Chart C - Groceries, Product Discovery Stage:** Grouped bar chart
  - Search Engine: 60% baseline (36% Replace in dark blue, 64% Not Replace in light blue)
  - Online Marketplace: 27% baseline (29% Replace in dark blue, 71% Not Replace in light blue)
  - Business Website: 50% baseline (35% Replace in dark blue, 65% Not Replace in light blue)
  - Social Media: 26% baseline (53% Replace in dark blue, 47% Not Replace in light blue)
  - Online Ads: 26% baseline (56% Replace in dark blue, 44% Not Replace in light blue)
- **Chart D - Travel, Product Discovery Stage:** Grouped bar chart
  - Search Engine: 74% baseline (33% Replace in dark blue, 67% Not Replace in light blue)
  - Online Marketplace: 32% baseline (26% Replace in dark blue, 37% Not Replace in light blue) [note: bars show 26% and 33% but total baseline is listed as 32%]
  - Business Website: 57% baseline (34% Replace in dark blue, 46% Not Replace in light blue) [note: bars show 34% and 54% but baseline appears to be 57%]
  - Social Media: 37% baseline (39% Replace in dark blue, 61% Not Replace in light blue)
  - Online Ads: 29% baseline (64% Replace in dark blue, 36% Not Replace in light blue)

Key Finding: Mainly focused on Google search and Business website search, more salient in the Electronics and Groceries use cases. Online Marketplace discovery more prevalent for Birthday gift.

Source: *Actions ranked high to low based on Birthday Gifts Based on the following sample sizes: Birthday n=124, Home Ent. N=126, Groceries n=125, Travel n=125

Figure 3.8: Product Evaluation Stage

Summary: This figure shows strong substitution effects of agentic commerce during the Product Evaluation stage, which enables comparison across different retailers and facilitates expert reviews.

Chart Descriptions:

- **Chart A - Birthday Gifts, Product Evaluation Stage:** Grouped bar chart
  - Browse Different Retailers: 60% baseline (39% Replace in dark blue, 61% Not Replace in light blue)
  - Browse across web: 52% baseline (49% Replace in dark blue, 51% Not Replace in light blue)
  - Browse Same Retailer: 44% baseline (56% Replace in dark blue, 44% Not Replace in light blue)
  - Browse Social Media: 35% baseline (45% Replace in dark blue, 55% Not Replace in light blue)
  - Read Journalists: 30% baseline (59% Replace in dark blue, 41% Not Replace in light blue)
  - Support via Email: 11% baseline (64% Replace in dark blue, 36% Not Replace in light blue)
  - Support via Phone: 7% baseline (56% Replace in dark blue, 44% Not Replace in light blue) [note: text shows 22% but chart shows smaller values]
- **Chart B - Electronics, Product Evaluation Stage:** Grouped bar chart
  - Browse Different Retailers: 67% baseline (31% Replace in dark blue, 69% Not Replace in light blue)
  - Browse across web: 52% baseline (44% Replace in dark blue, 56% Not Replace in light blue)
  - Browse Same Retailer: 44% baseline (35% Replace in dark blue, 65% Not Replace in light blue)
  - Browse Social Media: 33% baseline (46% Replace in dark blue, 54% Not Replace in light blue)
  - Read Journalists: 36% baseline (49% Replace in dark blue, 51% Not Replace in light blue)
  - Support via Email: 14% baseline (22% Replace in dark blue, 78% Not Replace in light blue)
  - Support via Phone: 10% baseline (23% Replace in dark blue, 77% Not Replace in light blue)
- **Chart C - Groceries, Product Evaluation Stage:** Grouped bar chart
  - Browse Different Retailers: 43% baseline (24% Replace in dark blue, 76% Not Replace in light blue)
  - Browse across web: 33% baseline (41% Replace in dark blue, 59% Not Replace in light blue)
  - Browse Same Retailer: 41% baseline (29% Replace in dark blue, 71% Not Replace in light blue)
  - Browse Social Media: 26% baseline (37% Replace in dark blue, 63% Not Replace in light blue) [note: showing 50%]
  - Read Journalists: 18% baseline (17% Replace in dark blue, 83% Not Replace in light blue)
  - Support via Email: 9% baseline (45% Replace in dark blue, 55% Not Replace in light blue)
  - Support via Phone: 5% baseline (50% Replace in dark blue, 50% Not Replace in light blue) [note: showing 60%]
- **Chart D - Travel, Product Evaluation Stage:** Grouped bar chart
  - Browse Different Retailers: 54% baseline (26% Replace in dark blue, 74% Not Replace in light blue)
  - Browse across web: 50% baseline (55% Replace in dark blue, 45% Not Replace in light blue)
  - Browse Same Retailer: 40% baseline (34% Replace in dark blue, 66% Not Replace in light blue)
  - Browse Social Media: 32% baseline (50% Replace in dark blue, 50% Not Replace in light blue)
  - Read Journalists: 28% baseline (51% Replace in dark blue, 49% Not Replace in light blue)
  - Support via Email: 19% baseline (58% Replace in dark blue, 42% Not Replace in light blue)
  - Support via Phone: 13% baseline (50% Replace in dark blue, 50% Not Replace in light blue)

Key Finding: Enables comparison across different retailers, facilitates expert reviews.

Source: *Actions ranked high to low based on Birthday Gifts Based on the following sample sizes: Birthday n=124, Home Ent. N=126, Groceries n=125, Travel n=125

Accessibility Notes

3. New Zealand (continued)

Figure 3.9: Cart Selection Stage

Summary: This figure demonstrates strong substitution effects of agentic commerce during the Cart Selection stage. The key finding notes that substitution is prevalent in shopping for available discount codes, providing shipping and payment, and cart actions.

Chart Descriptions:

- **Chart A - Birthday Gifts, Cart Selection Stage:** Grouped bar chart
  - Add to Cart: 65% baseline (41% Replace in dark blue, 59% Not Replace in light blue)
  - Provide Shipping: 62% baseline (34% Replace in dark blue, 66% Not Replace in light blue)
  - Provide Payment: 58% baseline (44% Replace in dark blue, 56% Not Replace in light blue)
  - Discount Codes: 52% baseline (41% Replace in dark blue, 59% Not Replace in light blue)
  - Buy it Now: 32% baseline (55% Replace in dark blue, 45% Not Replace in light blue)
  - Memberships: 29% baseline (53% Replace in dark blue, 47% Not Replace in light blue)
- **Chart B - Electronics, Cart Selection Stage:** Grouped bar chart
  - Add to Cart: 62% baseline (50% Replace in dark blue, 60% Not Replace in light blue) [note: bars show 62% but baseline shows 62%]
  - Provide Shipping: 62% baseline (50% Replace in dark blue, 50% Not Replace in light blue)
  - Provide Payment: 60% baseline (54% Replace in dark blue, 46% Not Replace in light blue)
  - Discount Codes: 43% baseline (31% Replace in dark blue, 69% Not Replace in light blue)
  - Buy it Now: 37% baseline (45% Replace in dark blue, 55% Not Replace in light blue)
  - Memberships: 32% baseline (43% Replace in dark blue, 58% Not Replace in light blue)
- **Chart C - Groceries, Cart Selection Stage:** Grouped bar chart
  - Add to Cart: 59% baseline (36% Replace in dark blue, 64% Not Replace in light blue)
  - Provide Shipping: 51% baseline (41% Replace in dark blue, 59% Not Replace in light blue)
  - Provide Payment: 53% baseline (50% Replace in dark blue, 50% Not Replace in light blue)
  - Discount Codes: 32% baseline (28% Replace in dark blue, 73% Not Replace in light blue) [note: showing 60%]
  - Buy it Now: 25% baseline (42% Replace in dark blue, 58% Not Replace in light blue)
  - Memberships: 37% baseline (33% Replace in dark blue, 67% Not Replace in light blue)
- **Chart D - Travel, Cart Selection Stage:** Grouped bar chart
  - Add to Cart: 59% baseline (45% Replace in dark blue, 55% Not Replace in light blue)
  - Provide Shipping: 51% baseline (52% Replace in dark blue, 48% Not Replace in light blue)
  - Provide Payment: 59% baseline (42% Replace in dark blue, 58% Not Replace in light blue) [note: showing 55%]
  - Discount Codes: 34% baseline (50% Replace in dark blue, 50% Not Replace in light blue)
  - Buy it Now: 27% baseline (44% Replace in dark blue, 56% Not Replace in light blue)
  - Memberships: 31% baseline (51% Replace in dark blue, 49% Not Replace in light blue)

Key Finding: Prevalent in shopping for available discount codes, providing shipping and payment, and cart actions.

Source: *Actions ranked high to low based on Birthday Gifts Based on the following sample sizes: Birthday n=124, Home Ent. N=126, Groceries n=125, Travel n=125

Figure 3.10: Post-Purchase Stage

Summary: This figure shows strong substitution effects of agentic commerce during the Post-Purchase stage. The key finding notes that tracking and returns processing lead in replacement effect across different product categories.

Chart Descriptions:

- **Chart A - Birthday Gifts, Post-purchase Stage:** Grouped bar chart
  - Tracking: 69% baseline (43% Replace in dark blue, 57% Not Replace in light blue)
  - Register Warranty: 36% baseline (51% Replace in dark blue, 49% Not Replace in light blue)
  - Process Return: 30% baseline (41% Replace in dark blue, 59% Not Replace in light blue)
  - Submit review on-site: 22% baseline (52% Replace in dark blue, 48% Not Replace in light blue)
  - Publish review social: 20% baseline (48% Replace in dark blue, 52% Not Replace in light blue)
  - Set-up Assistance: 18% baseline (64% Replace in dark blue, 36% Not Replace in light blue)
- **Chart B - Electronics, Post-purchase Stage:** Grouped bar chart
  - Tracking: 71% baseline (49% Replace in dark blue, 51% Not Replace in light blue)
  - Register Warranty: 41% baseline (48% Replace in dark blue, 52% Not Replace in light blue)
  - Process Return: 30% baseline (34% Replace in dark blue, 66% Not Replace in light blue)
  - Submit review on-site: 29% baseline (50% Replace in dark blue, 50% Not Replace in light blue)
  - Publish review social: 19% baseline (42% Replace in dark blue, 58% Not Replace in light blue)
  - Set-up Assistance: 20% baseline (52% Replace in dark blue, 48% Not Replace in light blue)
- **Chart C - Groceries, Post-purchase Stage:** Grouped bar chart
  - Tracking: 52% baseline (28% Replace in dark blue, 72% Not Replace in light blue)
  - Register Warranty: 24% baseline (47% Replace in dark blue, 53% Not Replace in light blue)
  - Process Return: 20% baseline (32% Replace in dark blue, 68% Not Replace in light blue)
  - Submit review on-site: 24% baseline (40% Replace in dark blue, 60% Not Replace in light blue)
  - Publish review social: 19% baseline (33% Replace in dark blue, 67% Not Replace in light blue)
  - Set-up Assistance: 14% baseline (11% Replace in dark blue, 89% Not Replace in light blue) [note: showing as 89%]
- **Chart D - Travel, Post-purchase Stage:** Grouped bar chart
  - Tracking: 57% baseline (39% Replace in dark blue, 61% Not Replace in light blue)
  - Register Warranty: 34% baseline (47% Replace in dark blue, 53% Not Replace in light blue)
  - Process Return: 30% baseline (35% Replace in dark blue, 65% Not Replace in light blue)
  - Submit review on-site: 32% baseline (50% Replace in dark blue, 50% Not Replace in light blue)
  - Publish review social: 25% baseline (41% Replace in dark blue, 59% Not Replace in light blue)
  - Set-up Assistance: 18% baseline (35% Replace in dark blue, 65% Not Replace in light blue)

Key Finding: Tracking and returns processing lead in replacement effect across different product categories.

Source: *Actions ranked high to low based on Birthday Gifts Based on the following sample sizes: Birthday n=124, Home Ent. N=126, Groceries n=125, Travel n=125

Accessibility Notes

3. New Zealand (continued)

Figure 3.11: Most Important Factors

Summary: This figure reveals that New Zealand shoppers are most concerned with price, speed, and convenience while security is most important for slightly more than half.

Chart Descriptions:

- **Chart A - Importance Ranking:** Horizontal bar chart titled "Most important factors when shopping online"
  - Price: 75%
  - Delivery Speed: 64%
  - Discounts and Promotions: 62%
  - Ease of Use/Convenience: 57%
  - Security of transactions: 55%
  - Trusted business: 50%
  - Customer Service: 39%
  - Privacy of my data and purchase history: 38%
  - Product Variety: 38%
  - Return Policy: 37%
  - Control and visibility of online transactions: 31%
  - Personalised recommendations: 11%
  - Automated process for repeat purchases: 11%

Key Finding: New Zealand shoppers are most concerned with price, speed, and convenience while security is most important for slightly more than half.

Source: Agentic Commerce Consumer research survey in NZ, N=500

Figure 3.12: Motivations

Summary: This figure shows that agentic offerings that save shoppers time and money while reducing discovery friction are those most likely to drive adoption.

Chart Description:

- **Chart A - Adoption Motivators:** Horizontal bar chart titled "Which of the following statements would motivate you to use an AI shopping assistant like the one shown above?"
  - It will save me time: 46%
  - It will save me money due to price matching: 44%
  - It will find me what I can't on my own: 43%
  - I am provided a large variety of options: 36%
  - It can find me the best deals: 36%
  - It is more convenient: 31%
  - It is more safe and secure: 16%
  - Other: 0%
  - None of the above: 16%

Key Finding:

- Consumers are most motivated by the time-saving benefits (46%) and saving money thanks to price matching (44%)
- Discovery and finding products that shoppers cannot find on their own also ranks highly (43%).
- Shoppers are less influenced by increased safety and security compared to current shopping methods (16%)

Source: Agentic Commerce Consumer research survey in NZ, N=500

Figure 3.13: Top Concerns

Summary: This figure identifies data security and privacy as top concerns, followed by accuracy/reliability of purchases (likely driven by past fails on Social commerce). Very few have no concerns.

Chart Description:

- **Chart A - Concern Levels:** Horizontal bar chart titled "What concerns might you have about using the online shopping agent you were shown?"
  - Data Security: 53%
  - Privacy: 47%
  - Accuracy of Purchases: 44%
  - Reliability of service: 40%
  - Lack of control of the shopping process: 38%
  - Cost: 34%
  - Not able to talk to a real person for customer service: 30%
  - Sponsored or paid recommendations not clearly…: 27%
  - Not being able to process returns: 20%
  - Poor customer service: 17%
  - Not being able to process exchanges: 15%
  - Other, please specify: 2%
  - None of the above: 4%

Key Finding: Data security and privacy as top concerns, followed by accuracy/reliability of purchases (likely driven by past fails on Social commerce). Very few have no concerns.

Source: Agentic Commerce Consumer research survey in NZ, n=500

Figure 3.14: Personal Data Sharing

Summary: This figure reveals that consumers are wary to share their personal information, with less than half willing to do so, and even less sharing their financial information. 1 in 5 would not share any information at all.

Chart Description:

- **Chart A - Data Sharing Willingness:** Horizontal bar chart titled "To use this new service, what personal data would you be willing to share with the company offering it?""
  - Personal contact information (full name, email, phone): 49%
  - Home address: 45%
  - Transaction history: 25%
  - Online browsing history: 22%
  - Financial data – debit card number: 20%
  - Financial data – credit card number: 19%
  - Business address: 12%
  - Financial data – bank account number: 12%
  - None of the above: 22% (shown in black bar)

Key Finding: Consumers are wary to share their personal information, with less than half willing to do so, and even less sharing their financial information. 1 in 5 would not share any information at all.

Source: Agentic Commerce Consumer research survey in NZ, n=500

Accessibility Notes

3. New Zealand (continued)

Figure 3.15: Controls and Transparency

Summary: This figure demonstrates that shoppers widely agree with 84% saying consumer controls and transparency over personal data usage is critical. Only 1 in 5 would still consider using a shopping agent if no control is provided over consumer's data usage.

Chart Description:

- **Chart A - Importance of Data Control:** Vertical bar chart titled "When using AI-enabled e-commerce, the AI Agent may be collecting information about your shopping preferences and purchases. How important is it that you can control or delete how the Agent uses your data?"
  - Very important: 60% (dark blue bar)
  - Important: 24% (dark blue bar)
  - Somewhat important: 13% (gray bar)
  - Somewhat not important: 1% (gray bar)
  - Not important at all: 2% (gray bar)
- **Chart B - Likelihood of Using Without Control:** Vertical bar chart titled "If you cannot control how the Agent uses your data, what is the likelihood that you will still use the Agent?"
  - Extremely likely: 8% (dark blue bar)
  - Very likely: 13% (dark blue bar)
  - Somewhat likely: 22% (gray bar)
  - Not very likely: 30% (gray bar)
  - Not at all likely: 27% (gray bar)

Key Finding: Shoppers widely agree with 84% saying consumer controls and transparency over personal data usage is critical. Only 1 in 5 would still consider using a shopping agent if no control is provided over consumer's data usage.

Source: Agentic Commerce Consumer research survey in NZ, n=500

Figure 3.16: Most Trusted Brands

Summary: This figure shows trusted companies to provide AI include major payment networks and respondents' primary bank lead while Apple and other Big Tech providers follow. GenAI companies less trusted.

Chart Description:

- **Chart A - Company Trust Levels:** Horizontal bar chart titled "From which of the following companies would you feel comfortable using the new shopping service you were shown?"
  - Visa: 53%
  - PayPal: 44%
  - Apple: 32%
  - Your primary Bank: 27%
  - Mastercard: 27%
  - Samsung: 25%
  - Microsoft: 23%
  - OpenAI (ChatGPT): 22%
  - Amazon: 21%
  - Google (Alphabet): 19%
  - Meta (Facebook): 13%
  - Amex: 6%
  - IBM: 4%
  - Perplexity: 2%
  - Other, please specify: 1%
  - None of the above: 14%

Key Finding: Trusted Companies to Provide AI: major payment networks and respondents' primary bank lead while Apple and other Big Tech providers follow. GenAI companies less trusted.

Source: Agentic Commerce Consumer research survey in NZ, N=500

Figure 3.17: Preference for Retailer with Agent

Summary: This figure demonstrates that agents serve as a customer acquisition tool, with 34% of consumers being more likely to shop with a retailer if offering an on-site AI shopping agent.

Chart Description:

- **Chart A - Shopping Likelihood Impact:** Vertical bar chart titled "For those retailers you have not made an online purchase in the last 3 months, would an on-site AI shopping agent make you likely to purchase from them?"
  - More Likely: 34% (dark blue bar)
  - Neither more or Less Likely: 43% (gray bar)
  - Less Likely: 23% (gray bar)

Key Finding: Agents as a customer acquisition tool: 34% of consumers are more likely to shop with a retailer if offering on-site AI shopping agent.

Source: Agentic Commerce Consumer research survey in NZ, N=500

Figure 3.18: Online Retailers

Summary: This figure shows that multi-brand retailers with a strong online presence lead in New Zealand.

Chart Description:

- **Chart A - Recent Purchase Activity:** Horizontal bar chart titled "From which of the following retailers have you purchased a product or service online in the past 3 months?"
  - The Warehouse: 45%
  - Woolworths/Countdown: 45%
  - Kmart: 39%
  - Pak'n Save: 30%
  - New World: 29%
  - Bunnings: 20%
  - Mitre 10: 20%
  - Farmers: 19%
  - Briscoes: 17%
  - Noel Leeming: 15%
  - Other: 13%
  - Harvey Norman: 12%
  - JB Hifi: 12%
  - Four Square: 9%
  - Fresh Choice: 7%
  - N/A: 8%

Key Finding: Multi-brand retailers with a strong online presence lead in New Zealand.

Source: Agentic Commerce Consumer research survey in NZ, N=500