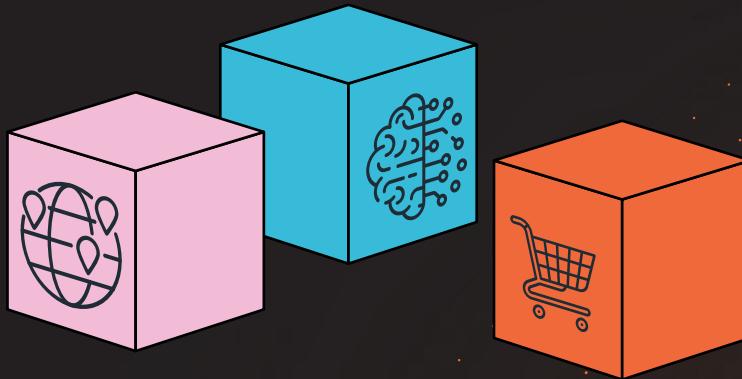


AI in the shopping experience

Market-by-market breakdown



Introduction

Welcome to the companion report to 'AI in the shopping experience: what consumers want'. Here you will find the data broken down into eight markets, allowing you to understand the readiness of consumers in your target market to AI tools.

We've noted some interesting variations between the markets, highlighting the need for different approaches rather than a one-size-fits-all strategy. If you would like a deeper dive into the data, and would benefit from being able to access the surveys in the Attest platform - or run further research - [get in touch](#) to discuss your requirements.



Survey Sample

The surveys were carried out among working age consumers (aged 18-64) and were designed to be either nationally representative, or have equal representation between age groups and genders. The research took place in March 2024 and included the following sample sizes:

-  **US: 2,000**
-  **UK: 1,000**
-  **Germany: 1,000**
-  **France: 1,000**
-  **Australia: 1,000**
-  **Canada: 1,000**
-  **Mexico: 1,000**
-  **Netherlands: 500**



American consumers are a little slower on the uptake of AI than some other countries. Behind Germany, they're the least likely to use a chatbot on a brand's website (49.8%). This could be down to an overall fairly pessimistic view of brands using AI, ranking cons much higher than pros. Particularly prominent are concerns about people being pushed out in favor of technology.

But it might also be a matter of trust, since, behind France, Americans have the highest level of distrust in companies collecting data via AI (37.0% actively distrust) and in information provided by AI tools (31.0% distrust it). However, the likelihood of using AI tools to research purchases is on a par with Canada and Australia, at 42.7%.

Interestingly, the US is the country least bothered about whether models used in marketing have been digitally altered; 66.1% of people say it's important airbrushing isn't used, in comparison to nearly 80% of French consumers. Meanwhile, 53.7% would be ok with AI-generated models, and more than a third believe AI will lead to more creative advertising.

Americans are not as good at spotting an AI-generated image as the French or British (23.8% identified the fake Nike ad), and 71.4% worry about being able to trust what they see. Just over 80% of consumers would like to see AI content labeled as such.

What US consumers think about brands using AI

Top 3 pros

Faster customer support: **43.0%**

Helping staff to do their jobs: **36.2%**

More creative advertising: **33.5%**

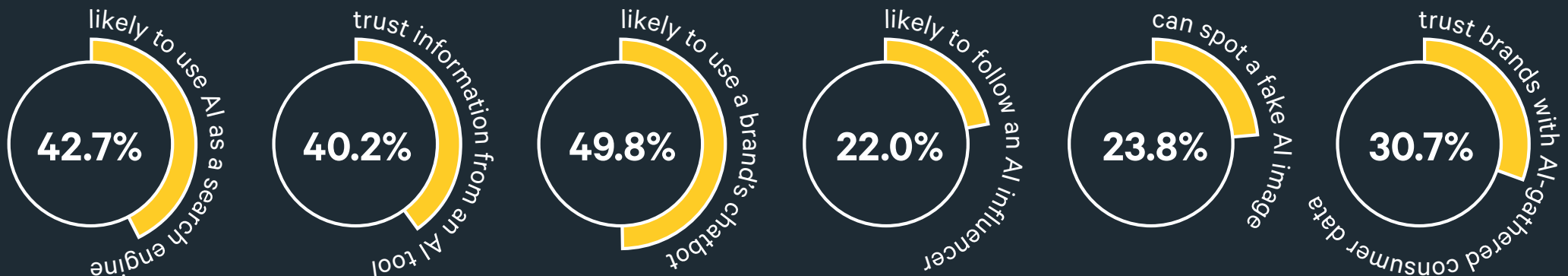
Top 3 cons

Taking jobs from people: **58.5%**

Loss of the human touch: **54.5%**

Inability to speak to a real person: **53.1%**

AI snapshot: The American consumer





Using AI tools for search is a growing trend, but British consumers are the least likely to be doing it. Just under 38% of UK consumers say they're likely to research products using a tool like ChatGPT, in comparison to 45.4% in France and a whopping 73.7% in Mexico.

Only 26.1% of Brits distrust information provided by AI, while 40.1% trust it, which suggests that turning to AI for answers will become more commonplace. UK consumers are already among the higher adopters of chatbots on brand's websites; 54.3% are likely to use them, compared to 49.8% in the US and 47.7% in Germany.

Despite this uptake, UK consumers are the least likely to believe that the customer experience will be improved by brands using AI (25.2%), with 60.1% worried about the loss of the human touch. Yet they are more optimistic than others that AI will lead to faster customer support (47.0%), and also that it will result in cheaper prices for consumers (35.3%).

Alongside the French, Brits are the best at being able to spot a fake AI-generated image - however, that's still only 26.2% of people. Just over 69% of UK consumers worry about being able to trust what they see because of AI, and support for mandatory labeling of AI-generated content is high at 81.5%.

What UK consumers think about brands using AI

Top 3 pros

Faster customer support: **47.0%**

Helping staff to do their jobs: **35.4%**

Cheaper prices: **35.3%**

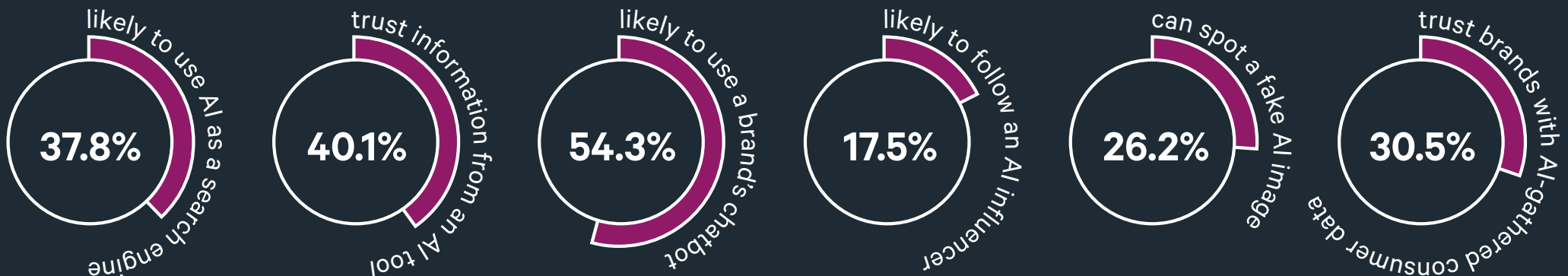
Top 3 cons

Loss of the human touch: **60.1%**

Taking jobs from people: **58.8%**

Inability to speak to a real person: **55.6%**

AI snapshot: The British consumer



Germany

Germans appear to have a rather relaxed attitude towards brands adopting AI technology. They are the least worried about it taking jobs from people (43.8%) and they're noticeably less likely to be worried about losing the human touch (49.7%), or the ability to talk to a real person (36.6%) - only Mexico ranks lower on these criteria.

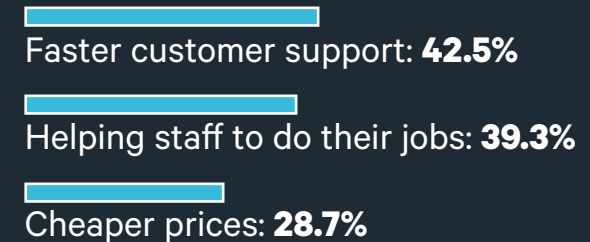
While Germans don't view AI as an imminent threat to retail, they don't seem convinced of its benefits either. They're the least likely to think it will lead to product innovations (25.2%) or more creative advertising (26.6%). And only 25.8% believe AI will improve the customer experience.

As a result, they're also less likely to be adopting AI tools; 39.7% of Germans say they are likely to use AI to research purchases (the lowest percentage after the UK), and they're the least likely nation to use chatbots on brands' websites (47.7%).

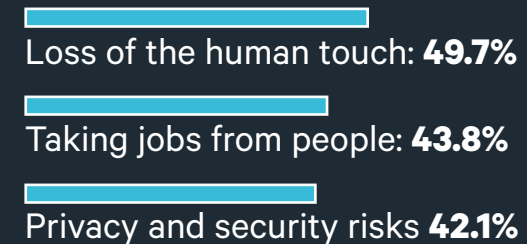
When it comes to real models being replaced in ads by AI models, Germans are likely to say they're ok with it (56.8%). We also see that Germans are among the most likely to follow an AI influencer (25.9%). They seem to feel more confident about being able to discern AI-generated imagery; 65.0% worry about it, in comparison to 75.8% in Canada. However, only 23.9% could spot the fake Nike ad.

What German consumers think about brands using AI

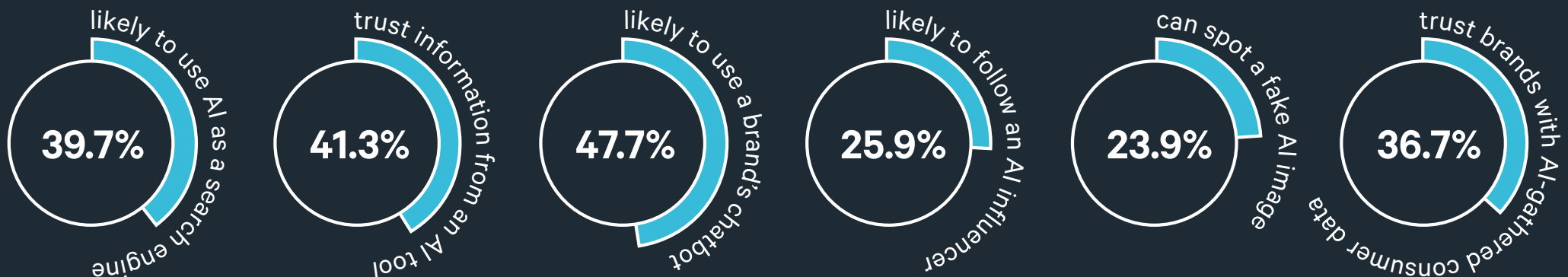
Top 3 pros



Top 3 cons



AI snapshot: The German consumer



France

French consumers have the lowest trust in AI. More than 38% actively distrust companies with the data they collect through AI tools (compared with 32.7% who trust them) and 77.5% want legislation to control it.




Meanwhile, the French are also the least likely to trust information from AI tools; only 36.4% would trust information given to them by something like ChatGPT, compared to 62.5% of Mexicans. Surprisingly, though, they're rapidly adopting AI for search purposes; 45.4% of respondents said they'd be likely to use AI to help research purchases.

French consumers also have somewhat contradictory opinions about AI in marketing. They show the highest preference for 'real' models that have not been Photoshopped (79.6%) but, at the same time, 62.6% are happy to see AI-generated models in ads. In our test, the French (alongside the Brits) were best at spotting the AI-generated Nike marketing image; identified by 26.4%. And they're less likely to worry about their ability to spot fake images, although it's still an important concern for 66.3% of consumers, and 78.8% want AI content labeled.

In terms of the benefits that will come from brands using AI, French consumers are the least likely to believe it will result in faster customer support (39.5%), but they are optimistic about it producing cost savings for the end consumer (36.5%).

What French consumers think about brands using AI

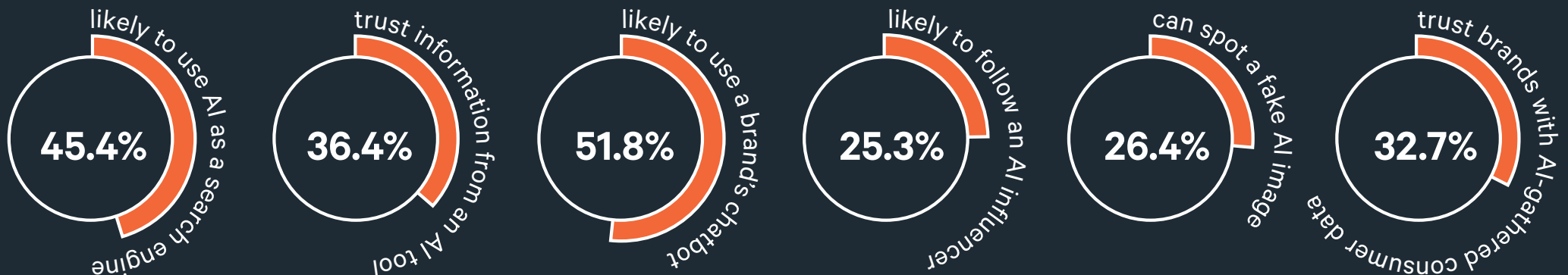
Top 3 pros

-  Helping staff to do their jobs: **39.6%**
-  Faster customer support: **39.5%**
-  Cheaper prices: **36.5%**

Top 3 cons

-  Loss of the human touch: **60.3%**
-  Taking jobs from people: **46.7%**
-  Inability to speak to a real person: **42.5%**

AI snapshot: The French consumer



Australia

Australian consumers are the most likely to think that brands using AI will be able to offer faster customer support (51.2% in comparison to 39.5% of French consumers), but that's where the positivity stops. Australia shows some of the highest levels of pessimism around AI technology in retail. For example, 47.4% of consumers are concerned about privacy or security weaknesses, while 41.5% believe AI has the potential to mislead or misinform consumers.


Australians are especially concerned about the impact of AI on workers, with 59.5% worried about it taking jobs from people, and 61.0% fearing the loss of the human touch. Australian consumers also over-index for worrying about the potential for bias, such as sexism and racism (23.3%), and about general inauthenticity related to brands using AI (35.6%).


Australians show the strongest desire for legally-required labeling of AI-generated content (85.6%), and 68.4% worry about being able to trust what they see or hear, although 24.1% were able to identify the fake Nike ad.

The use of AI for search is starting to gain traction, with 41.1% of consumers likely to do it and 38.6% likely to trust the information they're given. Likewise, despite the misgivings about AI in retail and marketing, 50.5% of consumers are likely to use a chatbot on a brand's website.

What Australian consumers think about brands using AI

Top 3 pros

 Faster customer support: **51.2%**


 Helping staff to do their jobs: **42.0%**

 More creative advertising: **32.9%**

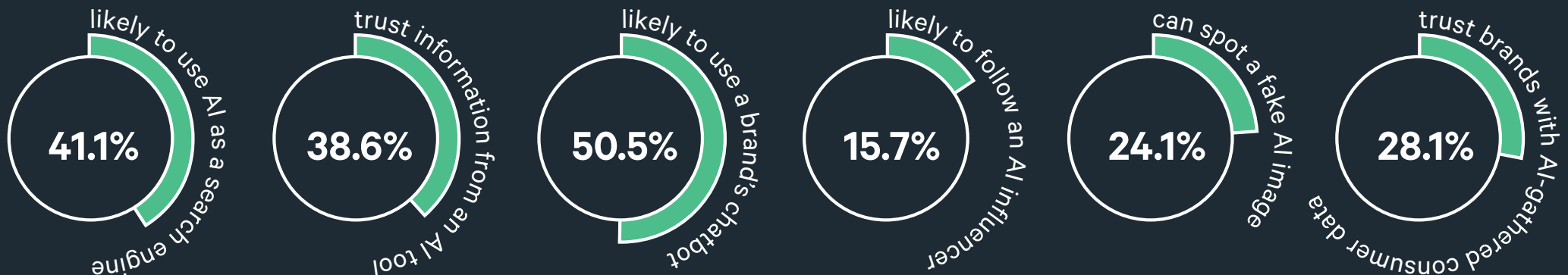
Top 3 cons

 Loss of the human touch: **61.0%**

 Taking jobs from people: **59.5%**

 Inability to speak to a real person: **55.0%**

AI snapshot: The Australian consumer



Canada

Canadians have a similar attitude towards AI in retail as their Australian counterparts, being more likely to associate negative outcomes with the introduction of AI tools than positive. Canadian consumers are the nation most likely to be worried about the inability to speak to a real person (57.0%), while 61.3% worry about the loss of the human touch.

They also rank top for concern about being misled/misinformed (43.3% in comparison to France, at 31.1%), and inauthenticity (36.1% compared to Mexico's 10.1%). On the other hand, Canadians are the most likely to believe in AI's potential to make advertising more creative (34.0% compared to 26.6% in Germany).

Despite this view, advertising is still an area of concern, with Canadians the most likely to worry about being able to trust what they see (75.8%), and 84.7% supporting mandatory content labeling. In our AI-generated imagery test, 23.0% were able to spot the fake, putting Canadian consumers just behind US ones (23.8%).

Alongside Australians, Canadians are the least likely to follow an AI influencer (15.7%), but they rank fourth highest for the use of chatbots (52.9%). Meanwhile, just over 41% of Canadian consumers would be likely to use an AI tool to help them research purchases, with 40.5% likely to trust the information provided.

What Canadian consumers think about brands using AI

Top 3 pros

Faster customer support: **50.4%**

Helping staff to do their jobs: **39.1%**

More creative advertising: **34.0%**

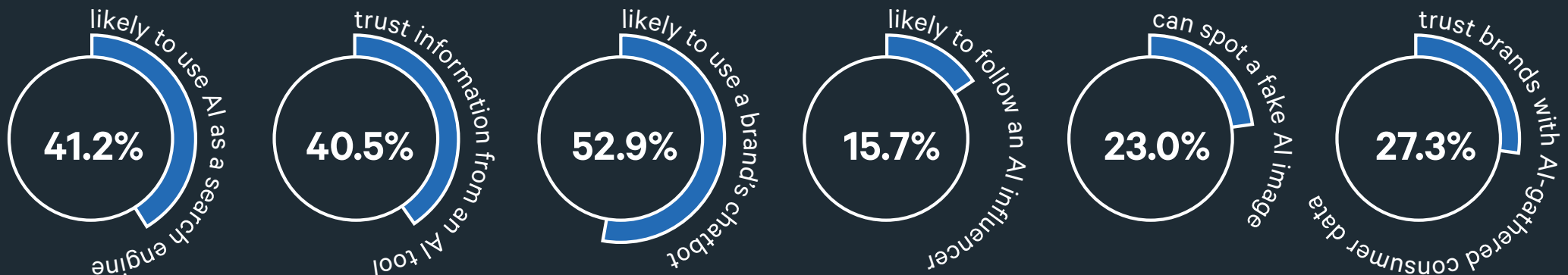
Top 3 cons

Taking jobs from people: **61.3%**

Loss of the human touch: **61.3%**

Inability to speak to a real person: **57.0%**

AI snapshot: The Canadian consumer



Mexico

Mexico stands out from the seven other markets as being quite unique when it comes to embracing AI. A huge 73.7% of Mexican consumers have already adopted AI tools to help them research purchases - and they show the highest level of trust in information provided by AI (62.4%, compared with 36.4% in France).




Mexicans are also significantly more likely to use a chatbot on a brand's website (74.2%), and even show high intent to follow AI-generated influencers on social media (42.1%). They believe AI in retail will bring different benefits to consumers in other nations; 42.3% think it will lead to better product innovations and 37% think it will improve the customer experience.

Mexican consumers exhibit far greater trust in brands using AI technology, with 57.1% trusting companies with the data they collect through AI, and only 29.6% worried about security or privacy weaknesses (in comparison to 47.4% of Australians).



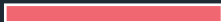
Concern about things like inauthenticity, bias, the loss of the human touch or the inability to speak to a real person are lowest in Mexico, while consumers there are the most open to seeing AI models in ads (67.2% are ok with it). The attitude to AI is resoundingly positive, although Mexican consumers would still like to see laws controlling it; 83.0% want AI content labeled and 87.6% want regulation for companies using AI-gathered consumer data.

What Mexican consumers think about brands using AI

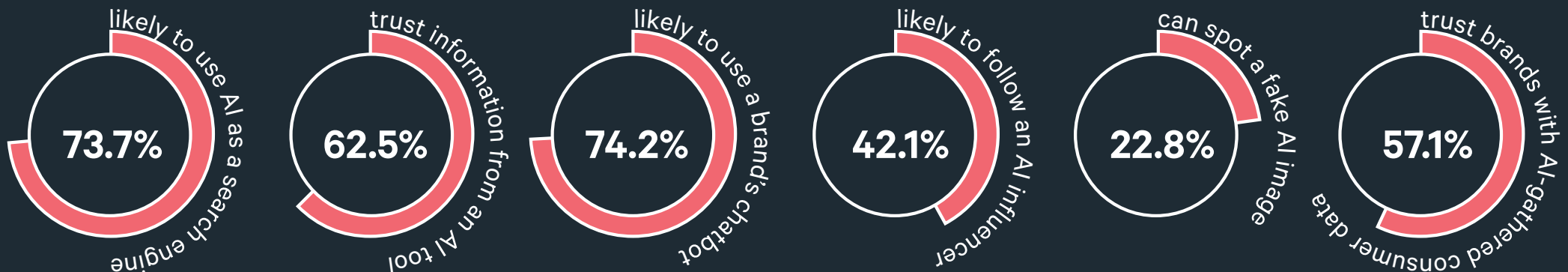
Top 3 pros

-  Better product innovations: **42.3%**
-  Faster customer support: **42.0%**
-  Improve the customer experience: **37.0%**

Top 3 cons

-  Taking jobs from people: **44.2%**
-  Loss of the human touch: **41.2%**
-  Potential to mislead or misinform: **31.5%**

AI snapshot: The Mexican consumer



Netherlands

The Dutch see one big benefit in brands using AI - increased efficiency that will lead to cost savings for the consumer. Nearly 57% of consumers believe they'll enjoy cheaper prices, and it's an optimism unmatched by any other market (France is the second highest with 36.5%).

Dutch consumers also have the most belief that AI will support staff to do their jobs (46.4%) and that it will result in a more personalized customer experience (29.6%). This positive sentiment is reflected in their uptake of AI tools; 59.5% are likely to use chatbots on brand's websites, which is second only to Mexico.

Turning to tools like ChatGPT when researching a purchase is also fairly common, at 44.9% and puts the Netherlands ahead of five other markets. Dutch consumers are likely to trust information given to them by AI tools; 45.0% trust, while only 25.6% distrust.

The Dutch are least likely to worry about being unable to discern AI-generated content (62.3%) and have the least desire to see image labeling become a legal requirement.

Although they scored the lowest in our test, with only 21.2% identifying the fake Nike ad. Interestingly, Dutch consumers are the most opposed to seeing AI-generated models in ads; 51% of people are against it. The primary reasons for this are that it could mislead consumers (62.1%) and that it could promote unrealistic beauty standards (57.1%).

What Dutch consumers think about brands using AI

Top 3 pros

Cost savings: **56.9%**

Helping staff to do their jobs: **46.4%**

Faster customer support: **46.2%**

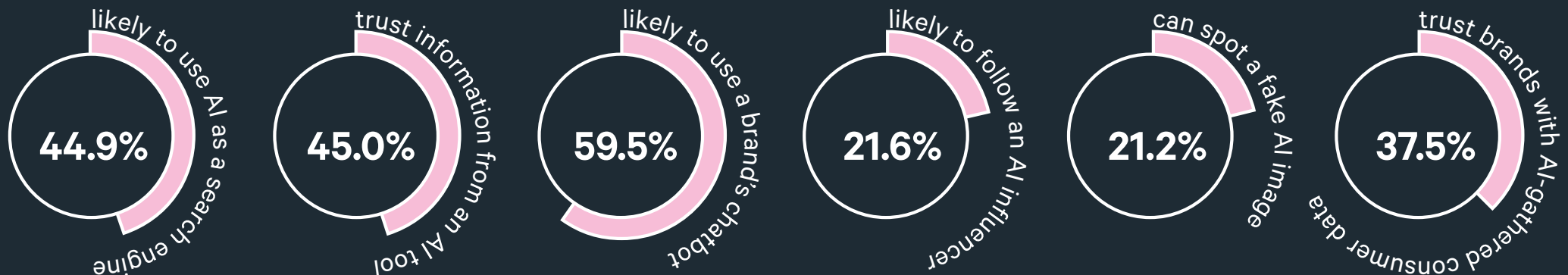
Top 3 cons

Loss of the human touch: **60.4%**

Inability to speak to a real person: **50.9%**

Taking jobs from people: **46.9%**

AI snapshot: The Dutch consumer



**Want to start a conversation
with your consumers about AI?**
[Talk to us.](#)

