

2027 Consumer trends report

The **mediated** consumer



Introduction

A mediated consumer is someone whose choices now pass through an AI assistant before they reach a brand. They still see your ad, still hear the recommendation from a friend, still walk past your shelf. But somewhere between noticing you and buying, they open an assistant and ask what it thinks. And what it tells them decides whether you are still in the running.

That is already happening in more than a third of first-time purchases, and it has arrived faster than most brands have had a chance to plan for.

The industry has decided this is a discovery problem. Get mentioned. Get recommended. Get found. Hence the scramble into answer engine optimization. That is not the problem our data found. Assistants introduce shoppers to brands they have never heard of all the time — and it makes almost no difference to what they buy. What an assistant really does is arrive partway through a journey that started somewhere else and answer the question the shopper still had. Sometimes that question is about you. It is not a new place to be discovered. It is a new stage to survive.

Nearly three quarters of AI-assisted purchases go to a brand the shopper already knew — 73%. Without an assistant it's 71%. Identical. An assistant doesn't move spend away from known brands; it reshuffles which known brand wins.

That raises harder questions than “how do I get mentioned?” If an assistant mostly converts the awareness you already have, what is worth paying for? And what do you do about being ruled out inside a conversation you will never see?

But what consumers are willing to hand over doesn't stop at the checkout. A third would drop their financial adviser for an assistant if it were cheaper. One in five want one to stop them buying something they would later regret. Among the heaviest users, both of those roughly double and comfort grows with use, at any age.

Shopping is only where this starts.



Todd Latham
CEO, Attest

Contents

- 04 Chapter 1 › AI is becoming a habit**
AI use, paid subscriptions and the rise of the AI shopper
- 11 Chapter 2 › The new layer**
Where AI enters the purchase journey, and what it rules out
- 17 Chapter 3 › Paying to be in the answer**
Trust in AI recommendations, and the arrival of advertising
- 23 Chapter 4 › From mediation to delegation**
The tasks consumers will hand over to an AI assistant
- 30 Chapter 5 › Ceding control**
Spending controls, cheaper AI advice and the human premium
- 37 Conclusion**
- 39 Methodology**

About this study

This is the seventh year Attest has produced the Consumer trends report. For the 2027 edition we carried out two nationally representative surveys of 4,000 consumers across the US and UK, asking about a real purchase journey. Figures are pooled across both markets unless a market is named, and the full methodology is on page 39.

The highest data quality standards have been applied to the research: Attest is a signatory of the GDQ Data Quality Excellence Pledge, a cross-industry commitment to verified participant identity, transparent sample sourcing and participant protection, backed by ESOMAR, the MRS and the Insights Association. Attest is the trusted research partner for global brands including Bloomberg, Netflix, Unilever, J.P. Morgan, Reddit and Nestlé.

Chapter 1

AI is becoming a habit

AI use is deepening rather than just spreading, and the consumers furthest along are the ones brands can least afford to lose.

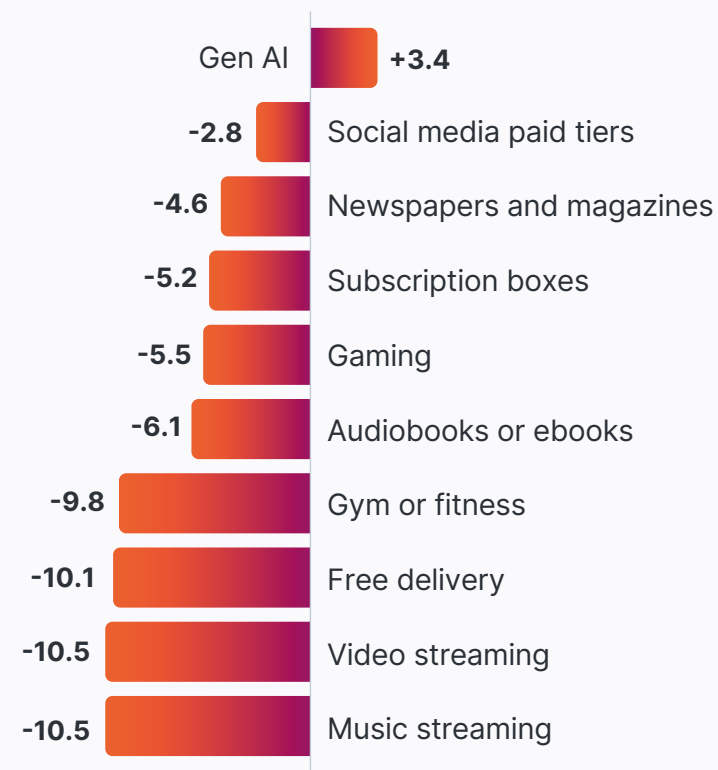


People are using AI more, and starting to pay for it

Nine in ten consumers now use an AI assistant for something: 65% use one to ask questions or look something up, 41% to write or edit, 34% for work or study and 26% to shop or choose what to buy. The average person used just under two different assistants in the month we surveyed, with ChatGPT reaching 56% and Google's AI answers 52%.

Usage on its own is a weak signal of commitment, because it costs nothing. The more telling number is how many people now pay. One in five consumers pay for a gen AI subscription: 19.5% in the US and 20% in the UK. It is the only one of ten subscription categories that grew in either market in the past year; the other nine fell in both. In the UK it rose from 15% to 20%, climbing from eighth place to joint fifth, passing audiobooks and social media and drawing level with gaming. In the US it went from 18% to 19.5%, moving seventh to sixth — though that rank change owed more to a decline in gym and fitness subscriptions than to gen AI's own growth.

Change in subscription ownership, 2025 to 2026, percentage points





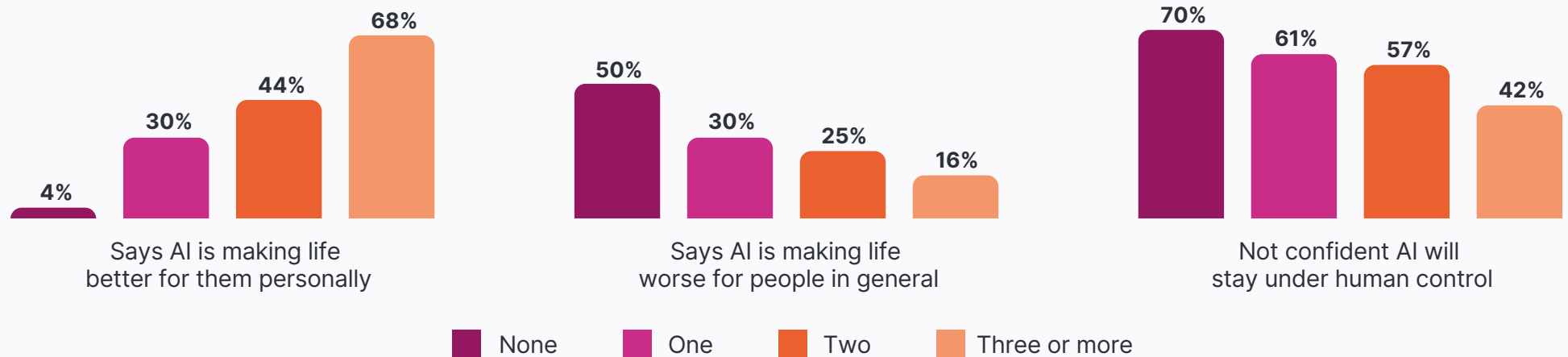
Work is where the change is most visible: 51% of consumers say AI has changed their working life in some way. A quarter of consumers now do their job differently because of it, 23% have had to learn new skills, and 13% say their employer expects them to use it. Work looks like the accelerant. Consumers who use AI for work or study use nearly twice as many assistants as those who don't, and the habit doesn't stay at the desk: they are twice as likely to use AI to shop, to plan something or to choose what to watch, and three times as likely to pay for a subscription. Whatever else AI at work is doing, it is producing experienced users faster than anything else in the market. And experience changes what people are willing to let AI do.

Comfort rises with use

Attitudes to AI are not evenly spread, and they do not divide by age or income nearly as sharply as they divide by how much someone uses it. Asked whether AI is making life better or worse for people in general, 8% of consumers who used no AI assistant in the last month say better, against 65% of those who used three or more.

The same gradient applies to sentiment around the safety and security of AI. Among non-users 70% are not confident that AI will stay under human control. Among those who used three or more AI assistants, that falls to 42%.

Attitudes to AI, by how many assistants someone used in the last month



Those who have adopted AI broadly say it is delivering real value: 68% of people using three or more assistants say AI has made their own life better, and only 11% say worse. What this isn't is a generational shift waiting to arrive. Set age and use directly against each other and use wins easily. Among people who used no assistant in the last month, 9% say AI is making life better for people in general — the same whether they are under 35 or over 55.

Nor is heavy use a young person's habit. It peaks between 25 and 44, not among the under-25s, who use fewer assistants than people a decade older than them. So brands can't wait for a cohort to age into this. The consumers furthest along aren't a future generation — they're the 25 to 44 year olds most brands already treat as their core. And the more things people use an assistant for, the more likely one of them is shopping.



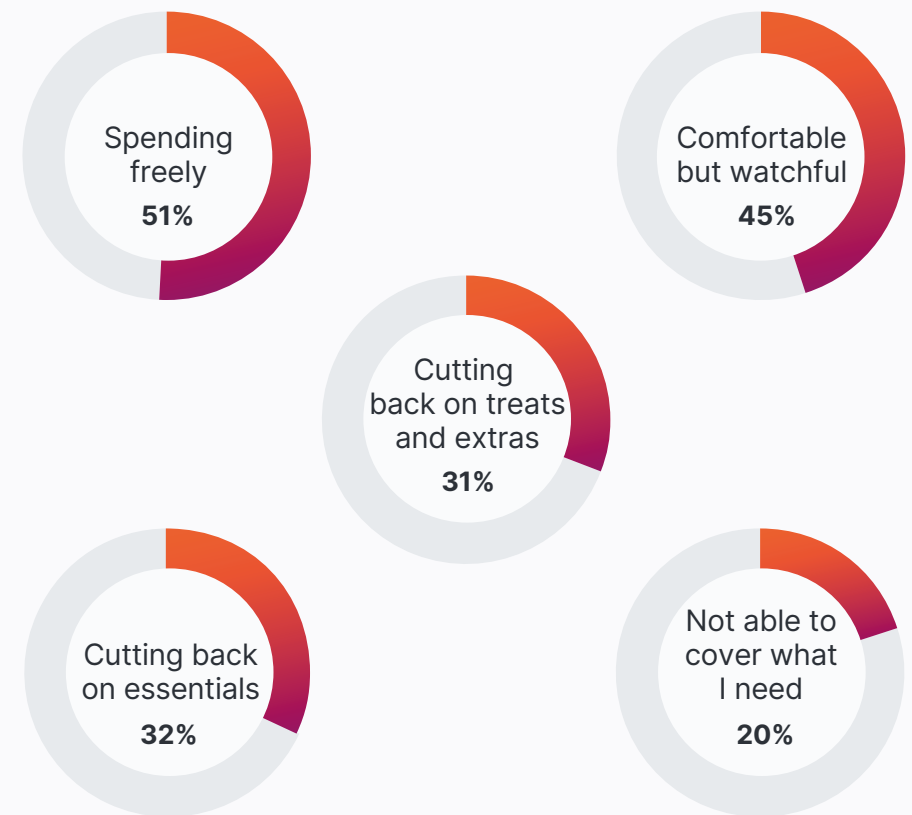
AI shoppers are a valuable segment

The percentage of consumers who say they use AI to shop or choose what to buy stands at 26%. That looks like a minor use case but it understates both the exposure and importance. AI turns up in more purchases than people think of as AI shopping: it played a part in 37% of the first-time purchases consumers described to us, and only half of those buyers would describe themselves as people who specifically use AI to shop.

But those who do tend to be serious buyers and not merely tire kickers. Only 9% say that using an assistant to look into something they're thinking of buying “rarely” or “almost never” ends in a purchase, while 44% say it “often” or “almost always” does.

Importantly, AI-assisted shopping is concentrated among consumers with the most money to spend. Among people who describe themselves as “spending freely”, 51% of recalled purchases involved an assistant. Among those “comfortable but watchful”, 45%. Among those who cannot cover what they need, 20%. In that respect, AI is a comfort good.

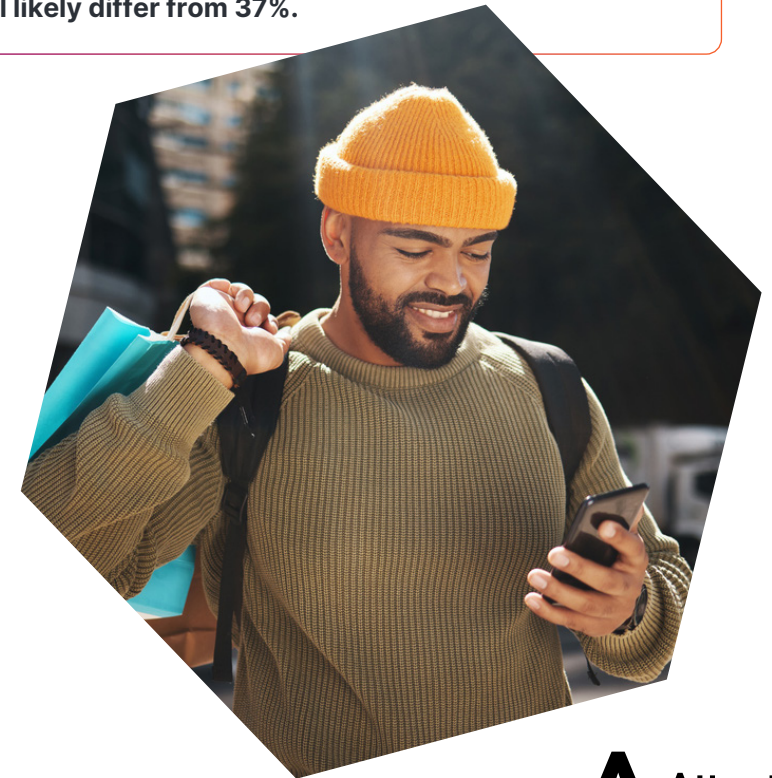
Share of first-time purchases involving an AI assistant, by financial position



It's not that consumers under financial pressure are avoiding AI; they're just as likely to use it for researching. What they don't do is route purchases through it. Why is a question this survey can't answer. It could be because people under financial pressure make fewer discretionary purchases, buy more out of necessity, and buy in categories where there's less to research. Either way, what it does tell us is AI assistants are now the middleman between brands and exactly the consumers they most want to reach.

What to do now

Add AI use to how you segment your customers. Someone's AI habit tells you more about how they'll behave than their age does — including how much they'll let an assistant do for them, and whether one turns up in their next purchase. Then size your own exposure rather than borrowing ours: the share of purchases in your category that involve an assistant will likely differ from 37%.



Chapter 2

The new layer

AI hasn't pushed its way to the front of the purchase journey. It has slipped into the middle of it, and become the place where things get ruled out.



AI isn't the starting point

An AI assistant played a part in 37% of the first-time purchases consumers told us about. But only 22% of AI-assisted journeys started with someone opening an assistant. The other 78% were already underway: the shopper had seen something, been told about something, or gone looking somewhere else first, and the assistant came in afterward to weigh in on what they'd found.

That changes what AI is for a brand. It is not a new place to be discovered; it is a new stage to survive, adding another layer of evaluation. Even when a shopping journey starts at a brand-owned or controlled touchpoint, such as a marketing email, ad or social post, it does nothing to reduce the chance an AI assistant gets involved (40% were AI-assisted versus 37% that began with a third party).

However, physical presence, it seems, does offer some protection. A shopper who first sees a product on a shelf is far less likely to bring an assistant into the decision: just 15% of journeys that began in a store involved AI, against 36% of those that began anywhere else. Some of that is simply that a shopper holding the product has less left to ask. But the more of your sales start on a shelf, the less of your business is passing through an assistant at all.

Likelihood of a purchase journey involving an AI assistant, by where the journey began

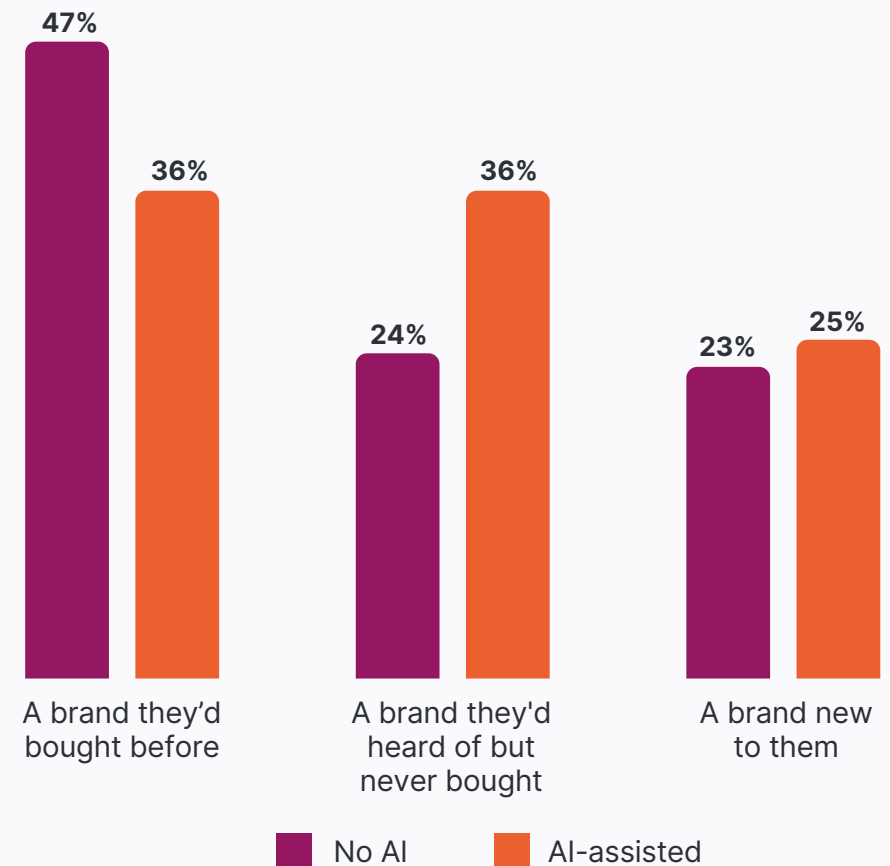


AI cashes in the awareness you already built

The received wisdom is that AI is a new place to be discovered — that if an assistant doesn't mention you, you effectively don't exist. Our data suggests the opposite problem. Nearly 8 in 10 shoppers who made an AI-assisted purchase say it suggested a product or service they hadn't heard of before, and 40% say it suggested several. But it doesn't change how often they buy from an unfamiliar brand.

A quarter of shoppers using AI bought a brand new to them — and a quarter bought one when no assistant was involved at all. What AI involvement actually moves is likelihood to choose a brand the shopper already knew but had never got around to buying. Those purchases run at 24% without an assistant and 36% with one — the largest single effect in this study, replicated independently in both markets.

Brand familiarity in first-time purchases, with and without an AI assistant



Without an assistant, a brand the shopper had previously purchased wins 47% of first-time purchases, which is more than twice as often as one they'd only heard of. With an assistant it wins only 36%, giving a brand the shopper knew but had never tried the same chance as one they'd bought before.

The implication is inconvenient for anyone selling answer optimization as a growth channel. An assistant is not so much building awareness as it is spending awareness already built, sometimes years earlier. Winning the answer, it seems, is worth a great deal if a shopper can already name you, and not much if they can't. The big question is, why?



What qual told us that quant could not

Alongside the survey we used Attest Explore to run 60 AI-moderated interviews — 30 in each market — asking people to talk us through a purchase an assistant had been part of. A survey can tell you that AI-assisted journeys convert brands the shopper knew but had never bought. It can't tell you what had been holding those purchases up.

The interviews can. People did not arrive at the assistant looking for a brand. They arrived carrying one, and carrying the question that had been keeping it unbought, usually a narrow, factual one. One man had seen a home drinks machine on social media and left it, because he already owned something similar and couldn't tell whether a second one was worth it. What unlocked it: "I asked Gemini what beers can I put in it... and once I found out I was confident."

That is what the lift looks like close up. Nobody was introduced to anything and nobody was persuaded. A purchase that had been stalled on one unanswered question got answered, in a few seconds, at the moment the person was ready to act.

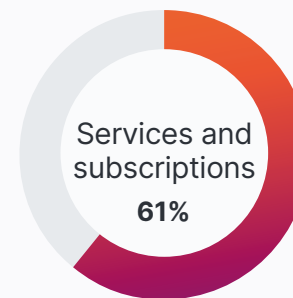
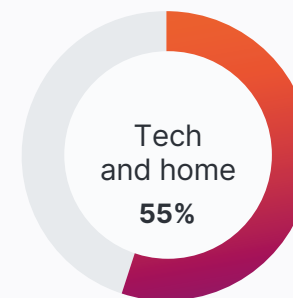
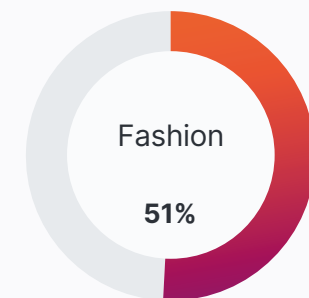
So an assistant is not generating demand here. It is draining a backlog of it — awareness a brand already paid for, finally converting.

The shortlist gets cut somewhere you can't see

Comparing options, weighing them against each other and striking out the ones that don't make it used to happen across product pages, review sites and shelves. Much of it now happens inside a single conversation — and for most shoppers it finishes there.

Fifty-six percent of shoppers who used an assistant ruled at least one product out because of what it told them, without checking anywhere else. A quarter ruled out several. Only 32% went and looked elsewhere before dropping something. Those products received nothing measurable. No visit, no click, no opportunity to answer. This is the part of the funnel no existing measure can see, and it is why a brand cannot diagnose this problem from its own data.

Products ruled out on an AI assistant's word, without checking elsewhere, by category



Products a shopper cannot inspect are ruled out most: 61% in services and subscriptions — travel, financial products, digital subscriptions — against 51% in fashion, where a coat can be judged by looking at it. Everyday goods and tech sit between, at 57% and 55%. Even at the bottom of that range, though, half of all AI-assisted fashion shoppers dropped something on the assistant's word without checking anywhere else.

The one thing that does differ is market. American shoppers rule something out unchecked 62% of the time against 52% in the UK, putting US brands at greater risk of being eliminated on AI's say so.

What to do now

Find out what an assistant says about you when someone asks. Your own data won't tell you: a product dropped inside a conversation leaves no visit and no click. And before moving budget into answer optimization, check how many people in your category can already name you. It converts awareness that exists and builds none, so without that it has nothing to work on.



Chapter 3

Paying to be in the answer

Advertising has arrived inside AI assistants. Whether it's worth paying to play comes with a few unanswered questions.



Shoppers think AI answers are impartial

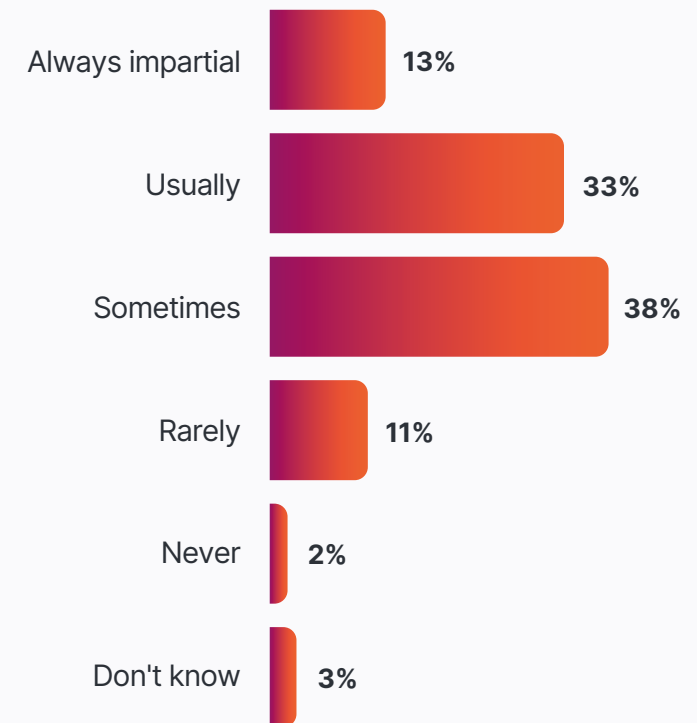
Shoppers take an assistant's word for things. More than half of them dropped a product on what it told them without checking anywhere else. A large part of the reason comes down to trust.

Among shoppers who used an AI assistant during a purchase, 46% believe its product advice is "usually" or "always" impartial. Only 13% think it is "rarely" or "never" impartial. The remainder sit in the middle, at "sometimes."

That belief tracks behavior closely. Shoppers who think the advice is impartial ruled a product out without checking 65% of the time. Among those who think it rarely is, the figure falls to 47%. The more neutral assistants are assumed to be, the less anyone feels the need to look elsewhere.

What the belief does not change is which brand wins. Shoppers who trust the assistant and shoppers who doubt it buy a previously untried brand at almost exactly the same rate (34% against 37%). So the assumed neutrality is not steering people toward particular brands. It is removing the step where they would have gone and checked. And that trust is exactly what is now being sold.

Consumer views on whether AI product recommendations are impartial





Consumers accept ads in AI — if they're told

Advertising inside the free tier of ChatGPT launched in 2026. OpenAI started showing ads to US users in February and to UK users in August. Google, meanwhile, has been placing ads in its AI summaries since late 2024. Ads are starting to get noticed: 41% of AI users say they have seen one in an assistant. It means brands can now pay to be present at the moment a shopper is choosing between brands.

So how do consumers feel about that? Shown an ad inside an AI answer that is clearly marked as one, 41% of AI users say they would be comfortable with it and 31% uncomfortable. The rest are indifferent.

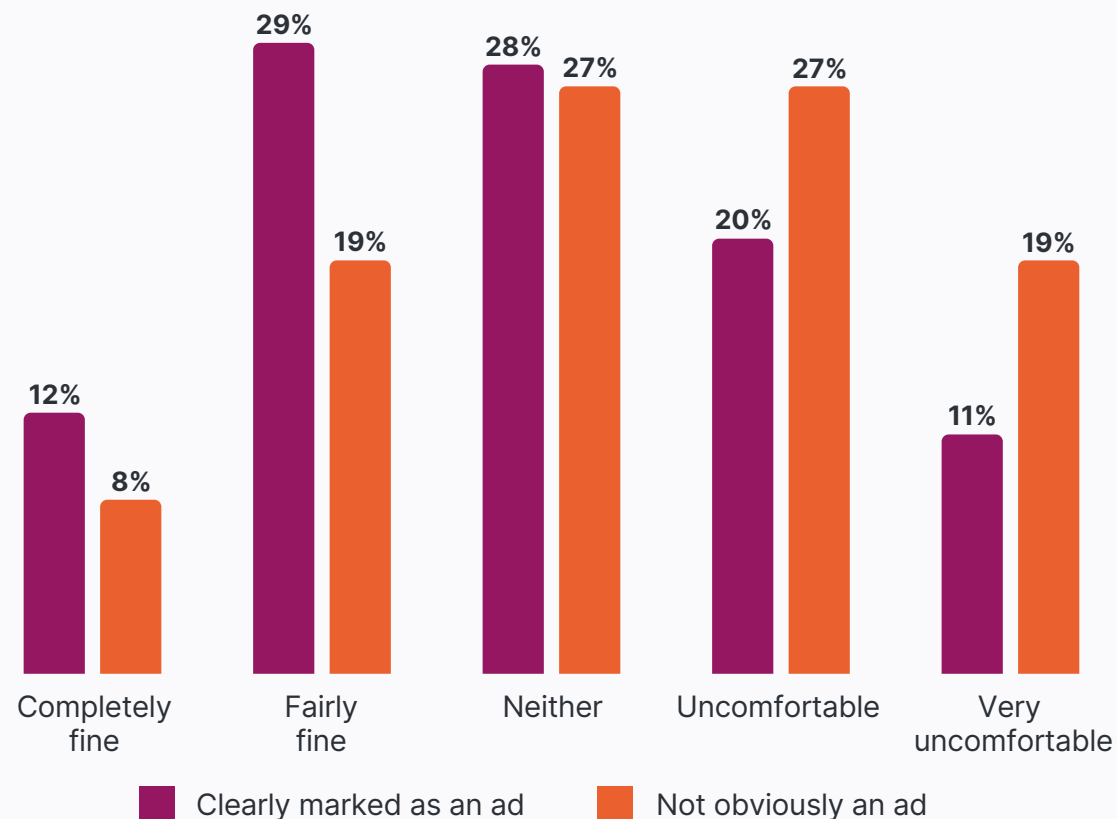
Change one thing — an ad that isn't obviously an ad — and the picture inverts. Comfort falls to 27%, discomfort rises to 46%, and the share who are very uncomfortable nearly doubles, from 11% to 19%. The objection isn't to being advertised to. It's to not being told.

Interestingly, objection to ads is lowest among the people who have actually seen one. Among those who have noticed ads in an assistant, 17% are uncomfortable with a marked ad and 60% are fine with it. Among those who have never noticed any, 41% are uncomfortable and 30% fine. The same split holds for unmarked ads: 34% uncomfortable among those who've noticed any, 56% among those who haven't.

That isn't simply a usage effect. Heavy users do notice more ads, but the gap holds at every level of use. And among people using three or more assistants who have seen one, 73% are fine with a marked ad.

Right now, disclosure itself isn't optional: regulators require sponsored content to be identifiable whatever the medium. What will vary is how prominent that disclosure is. And the more an ad blends into the answer, the worse it tests with the people it's meant to reach.

AI users' comfort with ads inside an assistant's answer

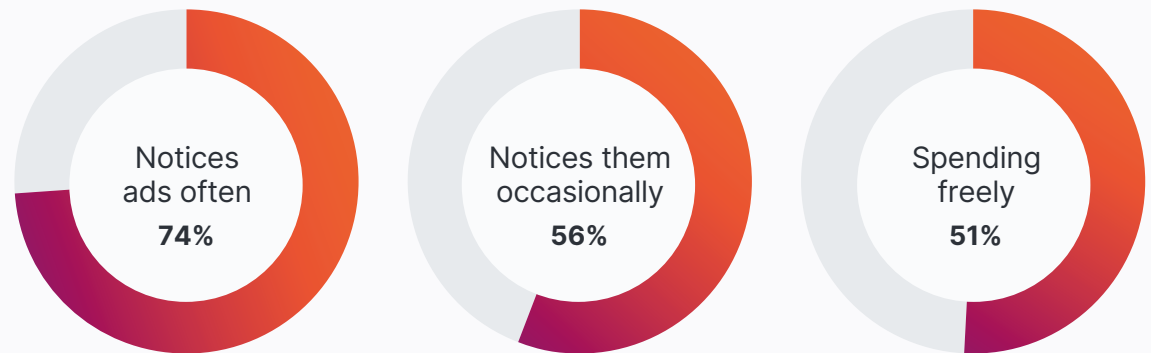


Ads might threaten the trust premium

There's an obvious worry for AI firms about allowing advertising inside answers: does it damage the trust premium that makes an assistant worth advertising against? If shoppers stop believing the answer is neutral, will they start checking elsewhere again?

We can't answer that with one wave of data. What today's data does show, however, is that the people most exposed to ads are the least likely to check: those who notice ads "often" ruled something out without checking during an AI-assisted purchase 74% of the time, against 51% of those who've never noticed any.

Likelihood to rule out products without checking elsewhere, by how often the shopper notices ads in AI assistants



Despite this, in February 2026, Perplexity decided to drop advertising entirely, little more than a year after introducing it. Its ads had been clearly labeled and did not influence what the assistant said, yet the company concluded that being trusted is worth more than the ad revenue. “A user needs to believe this is the best possible answer,” one executive told the Financial Times. Anthropic has made the same call for Claude. Google, which sells ads inside its AI summaries and its AI search mode, has so far kept them out of Gemini.

While the industry makes up its mind, the more useful question for brands is whether an ad behaves like everything else in this report. Assistants convert the brands a shopper already knows and do little for the ones they don’t. An ad might work the same way or it might be the one route that reaches someone cold. Our data can’t separate those. Answering it properly needs a test rather than a survey.

What to do now

Test AI advertising as a conversion channel, not an awareness one, and fund it from the budget that matches. Nothing here suggests an ad reaches someone who doesn’t already know you, so taking the money from brand building would be paying twice for the same customer. And when you’re offered format choices, take the one where the label is obvious.

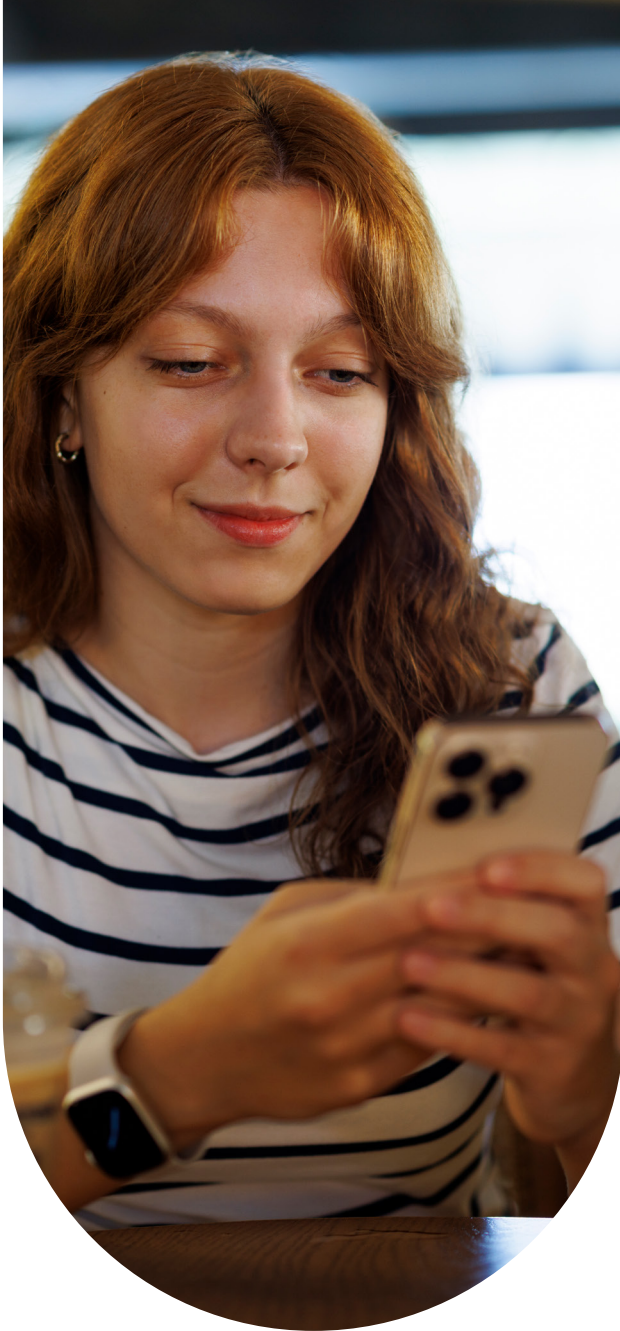


Chapter 4

From mediation to delegation

The extent to which AI will come between brands and consumers looks set to grow beyond shopping.





Consumers are open to delegating tasks

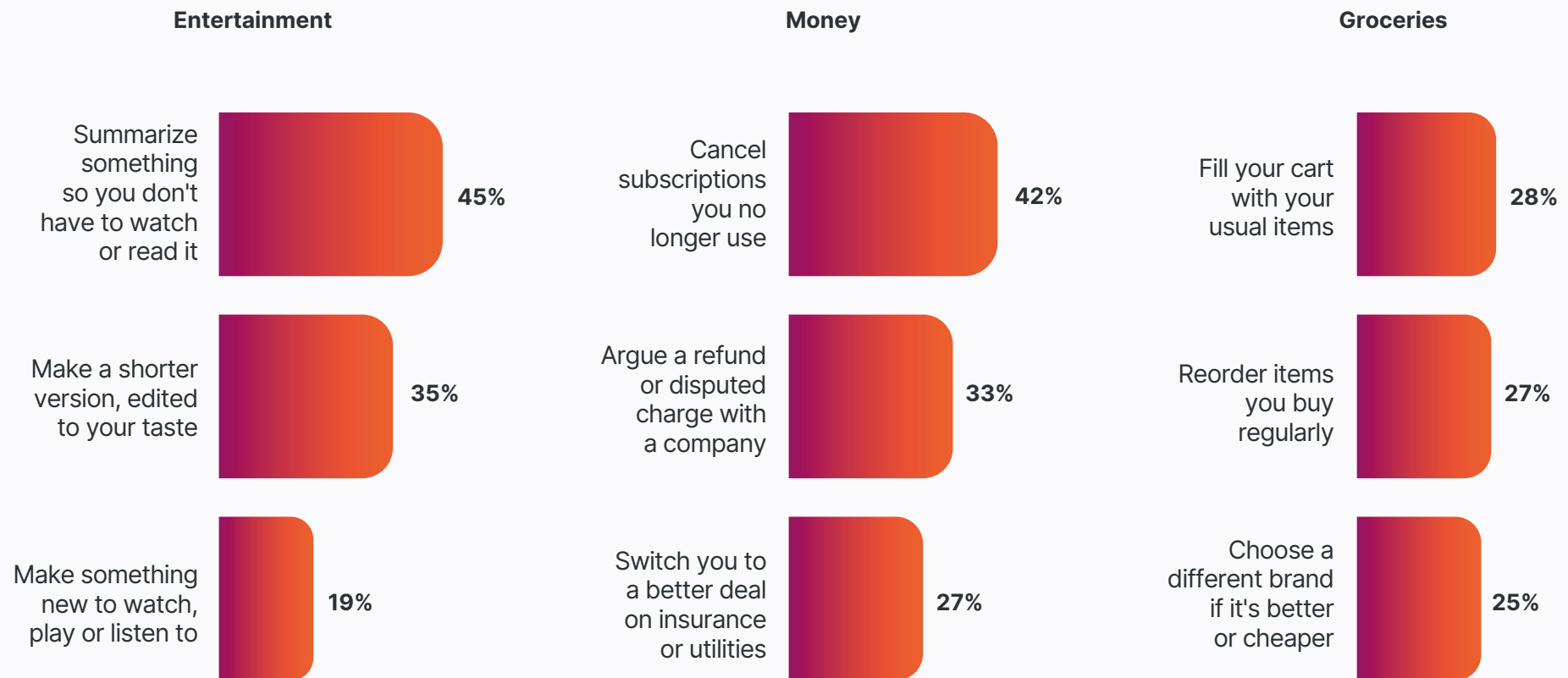
If an assistant that sits between a shopper and a brand at the evaluation stage is a new obstacle to overcome, one that starts intervening afterwards presents a whole course of them.

We asked consumers what they would let an AI assistant do on their behalf, across three parts of their lives: their entertainment, their groceries and their money. The appetite for delegation is broader than the current state of the technology would suggest.

Three quarters of consumers would let an assistant do at least one of the things we asked about in each of the three areas: 77% in entertainment, 73% in groceries, 74% in money. Outright refusal is a minority position everywhere: around a quarter refuse everything in any given area, and just 14% refuse everything across all three.

It means resistance to AI acting on your behalf isn't domain-specific. People are not squeamish about money and relaxed about television: someone who refuses everything in one area usually refuses everything in the others. But breadth and depth are different things. The average consumer would allow between one and one and a half tasks out of the six or seven offered in each area. So the typical position is not enthusiasm, and it is not refusal. It is a narrow, specific permission. Most people will let an assistant do something, but only a few will let it do a lot (more to come on those individuals later).

What consumers are most willing to let an AI assistant do, by area of life



An assistant is allowed to stop and repeat things, but not start them

Which particular task people will allow turns out to follow one rule, and it holds in all three areas.

Consumers would let an assistant take something away, repeat something they have already decided, or get something back for them. They would not let it begin anything new.

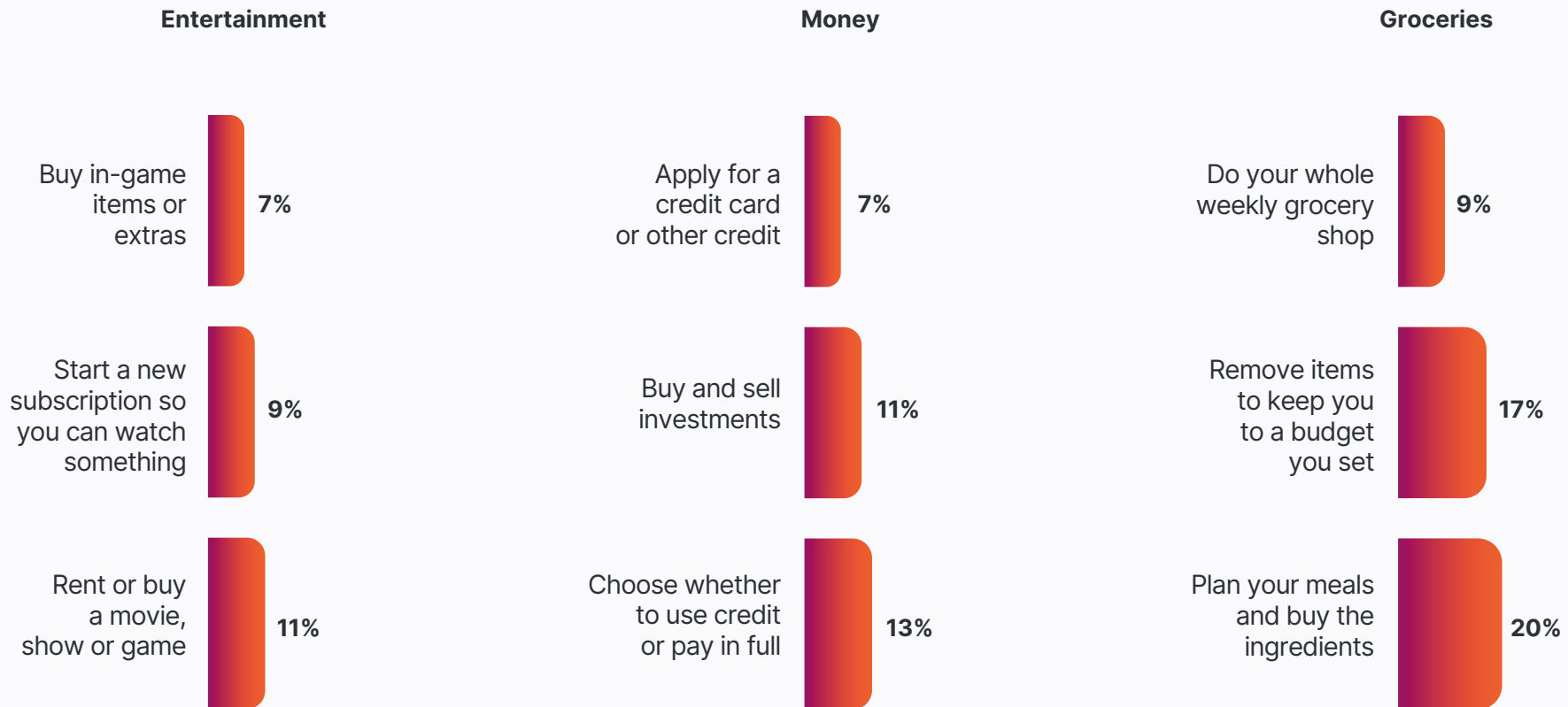
The cleanest demonstration sits inside subscriptions: 42% would let an assistant cancel subscriptions they no longer use, but only 9% would let one start a subscription so they could watch something. Same product, same money, opposite direction, and 33 points between them.

The rest of the picture follows the same logic. Summarizing a show so you don't have to watch it, arguing a refund with a company, cancelling, switching to a cheaper deal and reordering the groceries you always buy all cluster at the permitted end. Applying for credit, buying something extra inside a game, starting a subscription and handing over the entire weekly shop all sit at the bottom.

The obvious explanation is money, and it is wrong. Refilling a shopping cart spends money and 28% would allow it, because it repeats a decision the shopper has already made. Planning the meals and buying the ingredients, where the assistant decides what the household eats, drops to 20%. Doing the whole weekly shop, 9%. What consumers are protecting is not the money. It is the act of deciding.



What consumers are least willing to let an AI assistant do, by area of life

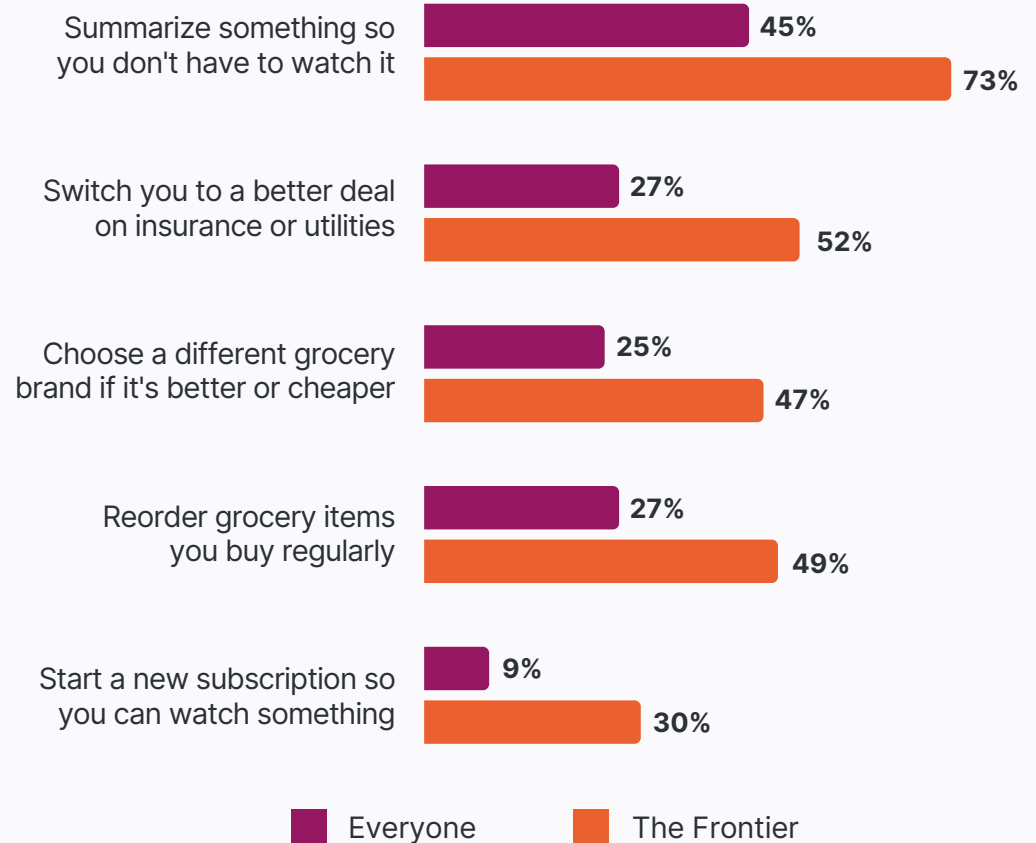


The heaviest users show where this goes next

One group is already much further along — at least mentally — when it comes to AI delegation. We call them the Frontier: the 8% of consumers who use AI for work, shopping and research and had used three or more different assistants in the last month. Their answers are a useful preview, because comfort appears to grow with use. And as AI usage grows, it follows that more people will start to think and behave as they do.

Among the Frontier, outright refusal to delegate almost disappears: 4% in entertainment, 8% in groceries, 8% in money, against roughly a quarter of everyone else. They would allow about twice as many tasks in every area, with tipping points already visible in places that have real ramifications for brands.

Tasks consumers would allow an AI assistant to do: the Frontier against everyone



For example, 52% would allow AI to autonomously move them to a cheaper deal on insurance or utilities versus 27% of the sample as a whole, and 47% would let it switch their usual food and drink brands for better or cheaper options (compared with 25%)

But what they do not do is change the rules. The order of the list is virtually identical to everyone else's. Cancelling still beats starting. Reordering the usual still beats handing over the whole shop and applying for credit is still last. That is the useful part as it suggests the sequence in which permission arrives is predictable even though the timing isn't. A brand planning for this does not need to guess which capability consumers will accept next. It needs to watch how far up its own list the line has moved.

What to do now

Sort your own customer interactions into two piles: the ones that stop, repeat or reclaim something, and the ones that start something new. The first pile is where delegation arrives first, whether you build for it or not, and anything in it that currently earns revenue because it's slightly inconvenient to escape has a deadline on it. The second pile buys you time, not exemption.



Chapter 5

Ceding control

Delegating a task is one thing. Letting an assistant overrule you or replace a person is another — and consumers are further along that road than the delegation numbers suggest.



AI agents could govern how consumers spend their money

Everything in the last chapter was about getting something done. Some of what consumers would allow is the opposite — an assistant that stops them. Nearly 40% would let an AI assistant stop them spending more than they meant to, 27% would let one stop them gambling once they had reached a limit they set. And the same proportion would let one limit how long they spend on an app or a game. A further 23% would let one stop them buying food or drink they are trying to cut down on.

These are not tasks. They are a consumer asking to be governed, and the most striking of them goes further still: 22% would let an assistant stop them making a purchase it thinks they would regret. Not a limit they set, not a rule they wrote — the assistant's own judgment about what is good for them.

What consumers would let an AI assistant stop them doing





There is one hard boundary: just 5% would let an assistant overrule them and block something when they insist. So an assistant can be a brake the consumer installs; it cannot be an authority the consumer has to argue with. Everything people would accept here, they would accept on the understanding that they can still override it.

Among the Frontier, the appetite is far larger: 58% would let an assistant stop them overspending, and 46% would let it stop a purchase it judged they would regret, which is more than double the general figure. Even there, though, only 13% would accept being overruled. The ceiling moves but the boundary does not.

AI advice wins when it's cheaper than a person's

We asked a deliberately commercial question: if it were cheaper than paying a person, which of these would you be happy to have done by AI? Price is clearly on the table, and acceptance is highest for exactly the professions that have historically charged most for judgment.

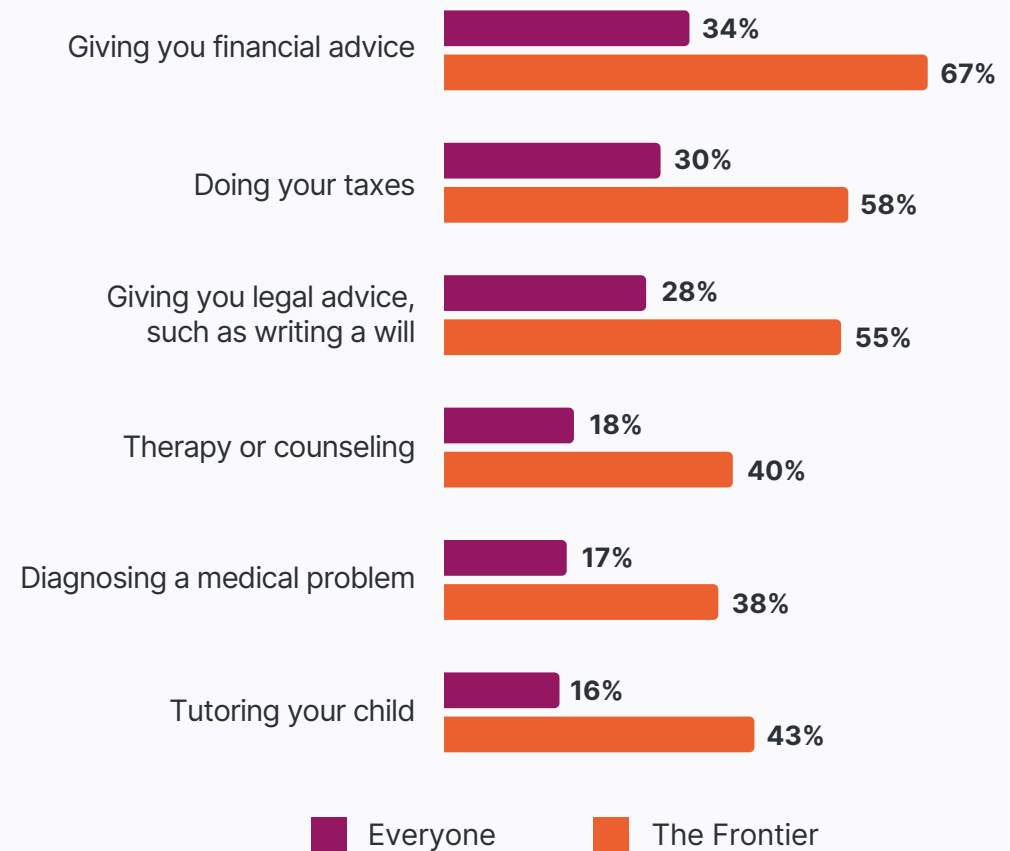
More than a third of consumers (34%) would take financial advice from an AI assistant if it were cheaper than a human adviser, 30% would have it do their taxes, 28% would have it give legal advice, such as writing a will. These are the three highest answers of eleven, and all three involve handing over a consequential decision rather than a chore.

In some ways the stakes are higher for the next tier because here you're handing over access to your mind, your body or your child. Even so, 18% would still accept therapy or counseling from an AI assistant at a discount, and 17% would have it diagnose a medical problem, while 16% would have it tutor their child.



Among the Frontier these figures roughly double and in places more: 67% would take financial advice from an assistant, 56% would have it do their taxes, 55% would take legal advice, and 43% would let it tutor their child. For professional services, the human premium is not a fixed property of the category. And while it is a price most consumers are currently willing to pay, a growing group is not.

What professional services consumers would have an AI do instead of paying a person, if it were cheaper

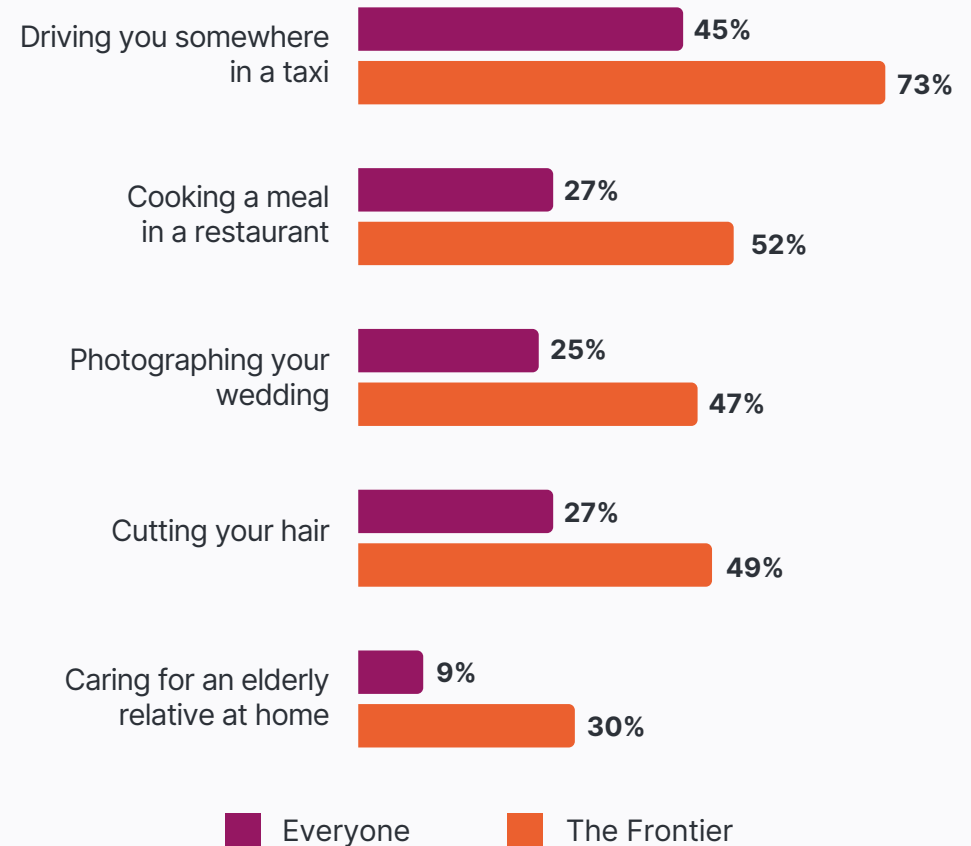


The human premium still holds in places

There are places where only the human touch will do, which is just as important for brands to understand as those which consumers are willing to automate. Only 14% would have an AI cook a meal in a restaurant and 12% would have it photograph their wedding. Less than one in 10 would let it cut their hair, and 7% would have it care for an elderly relative at home.

There's a clear lack of enthusiasm when it comes to personal services; however, it's worth contrasting this sentiment with what we know is actually happening. Less than 15% of consumers say they would accept an AI driving them if it were cheaper than a person. But autonomous taxis are a real service. Waymo alone was running more than 500,000 paid rides a week in the US by September 2026, ten times its volume two years earlier.

What personal services consumers would have an AI do instead of paying a person, if it were cheaper



Americans, who can now hail a driverless car in fourteen cities, say they would accept one no more readily than Britons, who mostly cannot: 14% against 15%. Stated willingness hasn't moved with availability, and the service has grown rapidly anyway.

Beyond personal services and professional advice, we asked what creative work people would accept from AI. We applied the condition that it was as good as something made by a person, deliberately taking quality out of the argument. Nearly 40% would be happy with a video game made by AI and 30% would hang AI art in their home, though acceptance falls to 22% for a song. For the Frontier, those rise to 66%, 59% and 45%.

And yet 22% of consumers would not accept AI producing any creative work at all — a large group, and a real one. Remember the taxis, though: willingness sat at 14% while the service grew ten times over. What people say they won't accept turns out to be a poor guide to what they end up using.

What to do now

Work out what your customers are actually paying for. If it's judgment, information or a transaction, a cheaper AI version will tempt them: a third would swap a financial adviser for an assistant on cost alone, and among the Frontier it's two thirds. If it's presence, care or craft, no discount will. The brands with most to think about are the ones that have been charging for judgment while describing it as craft.



Conclusion

Brands have spent two decades trying to get closer to their customers. Going direct, building their own channels, owning the relationship instead of renting it from a retailer. The middleman has come back — and this time the consumer chose it, installed it, and in one case in five pays a monthly fee to keep it.

Why do they want it? Look at what consumers will let an AI assistant do and the pattern isn't really about extra convenience. Cancel what I don't use. Get my money back. Move me to a cheaper deal. Stop me spending more than I meant to. They're granting it permission to act against the brands that are selling to them, and, by the end, against themselves.

An assistant that works for the consumer and not the seller is an assistant people trust. Shoppers take its word and don't check because they think it has no stake in the answer. For most people it is one of the few parts of their shopping life that appears to be on their side rather than someone else's.



And it is now for sale. Search, social feeds and marketplaces all made the same trade by allowing ads. The difference is that those platforms could survive being doubted; a sponsored result someone scrolls past still does its job. An assistant's whole value to an advertiser is that people don't scroll past and don't go and check. That only holds for as long as people believe it isn't being paid for.

Whether an AI answer can be bought by brands and believed by consumers simultaneously remains to be seen. In the meantime, the mediated consumer isn't being taken away from brands. They're being sorted between them, inside a conversation no brand can see.

What does this look like in your category?

If you want to know how often an AI assistant turns up in your buyers' journeys, what it says about you when they ask, and which of your competitors it's comparing you against, Attest can help.

Talk to one of our research experts:

www.askattest.com/book-a-demo

Methodology

Sample: we surveyed 2,000 consumers in the US and 2,000 in the UK between 22-30 September 2026 on Attest's consumer research platform. Both samples are nationally representative on age, gender and region.

The purchase questions: we asked every respondent to think of something they had bought for the first time in the last six months and walk us through how it happened: where it started, what they looked at, what they ruled out, and where they finally bought it. 3,252 consumers could recall one. Nine categories are covered, from food and drink to financial products. These questions describe purchases that actually happened.

How we counted AI involvement: a purchase counts as AI-assisted if the shopper either went looking using an assistant in the first place, or brought one into a journey that had started somewhere else. On this definition, an assistant played a part in 37% of recalled purchases.

Bases: questions about advertising inside AI assistants, about impartiality, and about ruling products out were asked only of people who use AI. Figures from those questions are described as a share of AI users. Anything described as a share of consumers uses the full sample.

Pooling: Where both markets told the same story we report a single pooled figure. Where they didn't, we report each market separately.

Segments: the Frontier is the 8% of consumers who use AI for work, for shopping and for research, and who had used three or more different assistants in the month before the survey (n=321). Chapter one uses a simpler cut — how many different assistants someone used last month — and a self-reported measure of financial position, running from “spending freely” to “not able to cover what I need”.

Stated willingness: chapters four and five measure what consumers say they would let an assistant do, not what they have done.

Reporting: we don't report figures on bases below 100. Differences described as significant are tested at the 95% level.

www.askattest.com

