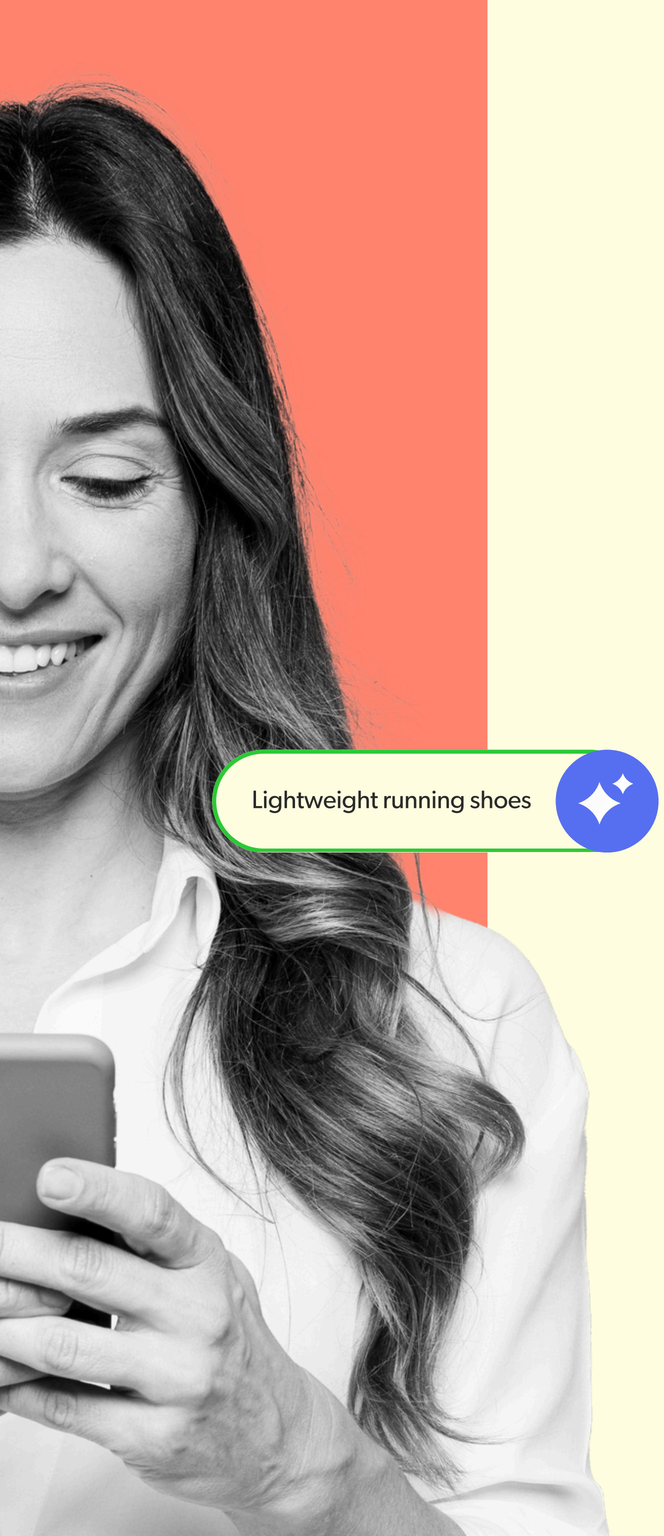
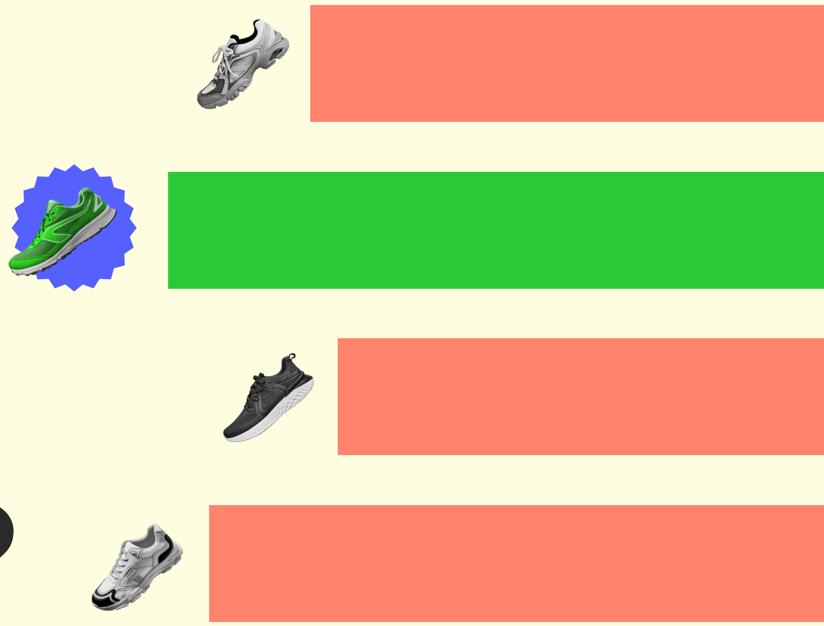


bazaarvoice

WHAT IS A BRAND WORTH WHEN AI DOES THE SHOPPING?



How AI shopping tests brand equity, and where it still wins.

PREFACE

A brand marketer's job has never been more complex. More places to sell, more places to advertise, more places to be talked about. And now, one interface that behaves like all of those at once: The AI assistant, which is gatekeeper, recommendation engine, ad platform, and checkout, depending on the day.

I spend most of my working life talking to these brand marketing leaders, and the agencies and vendors around them. The question I've been asked more than any other in the past year is some version of: **Does the rise of AI-assisted shopping change what my brand is worth?** Nobody had much to go on. Neither did I.

Bazaarvoice went and asked. This report draws on their Brand Equity Survey, fielded among more than 3,600 adults across the US, Europe, and Australia, and they invited me to read the results and argue with them in public. My commentary appears at the end of each section. It's mine, not theirs.

The clearest result: When an AI tool puts several products in front of a shopper, **65% click the brand they already know and trust**—more than double the number who click whatever AI has labelled the best match.

A key highlight of this report is the analysis of brand loyalty—specifically, how resistant shoppers are to switching brands and the premium they'll pay to stay. This analysis (p. 14) shows that the cost of dislodging an incumbent varies enormously by category, even in the face of a recommendation from an AI assistant.

Moreover, shoppers are loyal to brands because they believe they perform better. Few associate their loyalty with habit or heritage. That might objectively be misattributed, but it's what shoppers believe about themselves. They see themselves as discerning. Brands, whether the incumbent or the challenger, need to lean into this by providing signals that shoppers can latch onto as performance differentiators. These signals may come from brand-provided content on features and benefits, but for them to truly cut through—not only to shoppers, but to AI shopping agents—the product differentiators need to be elevated and verifiable through reviews and other user-generated content.

I wish I could tell you this is the last report you'll need to read about AI-assisted shopping. The final playbook. But rapid change is in the marketing job description now. What this research gives you is a read on the current state of the shopper journey, how AI is changing it, and what you can do about it right now.

KIRI MASTERS
Independent industry analyst and publisher of Retail Media Breakfast Club

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INTRODUCTION

Ask an AI tool to recommend a moisturizer, and you won't see the things you would if you were standing at a shelf full of moisturizers in a store: no logo you recognize on sight, no packaging to catch your eye, no "as seen in" callout, no premium positioning at eye level versus a bargain brand lower down. It will show you a list stripped of almost everything a brand has spent years building, reduced to specifications, a star rating, and a price.

And that's the key that makes this channel different: what it strips away.

Most of the places brands have historically built equity—at the shelf, on their site, on social—hand a shopper the brand first and the product second. AI tends to reverse that order, or skip branding almost entirely. A shopper comparing five moisturizers in an AI interface is looking at a flattened, largely unbranded list of options.

So, how can a brand adapt? By giving AI the signals it needs to paint a compelling, rounded picture of the product on the brand's behalf, even without a shelf to stand on.

The reality is, AI hasn't erased brand equity from the shopping journey. What AI *has* changed is the environment in which brand equity must operate—expected to do its job in a space specifically designed to minimize brand signal. With traditional brand cues stripped back, years of recognition and trust must make themselves felt in seconds.

That's a reason to get specific about exactly where and how equity gets tested, and how brands can respond—which is what this report sets out to do.

WHO THIS IS FOR

If you run a single, established brand, your job is largely defense: making sure your existing trust holds up when AI surfaces a flood of challenger brands—including dupes engineered to seem almost identical to your products, at a lower price.

If you run a portfolio of brands, the picture splits in two. Your flagship brand plays the same defensive game. But your newer, smaller, or recently acquired brands may face the opposite problem: To AI shopping agents and human shoppers alike, they are the unfamiliar alternative. Protecting the flagship and building proof for the emerging brand are two different jobs, and this report speaks to both.

1 THE RECOMMENDATION

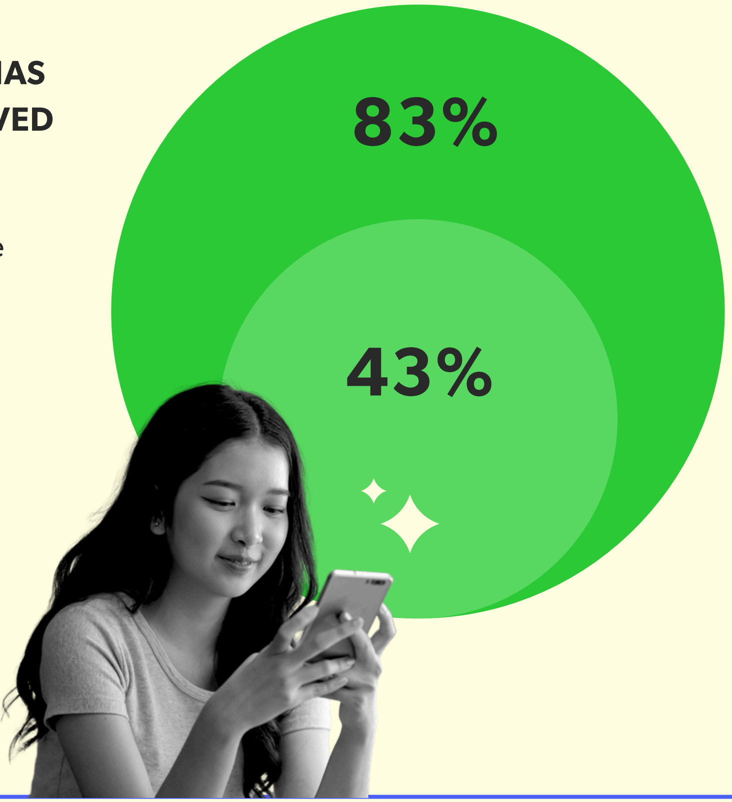
43% of people have used AI tools specifically to help them shop.

AI SHOPPING HAS ALREADY ARRIVED

83% of consumers have used AI in the past six months

43% have used AI tools specifically to help them shop

Source:
Winning the AI shelf with UGC



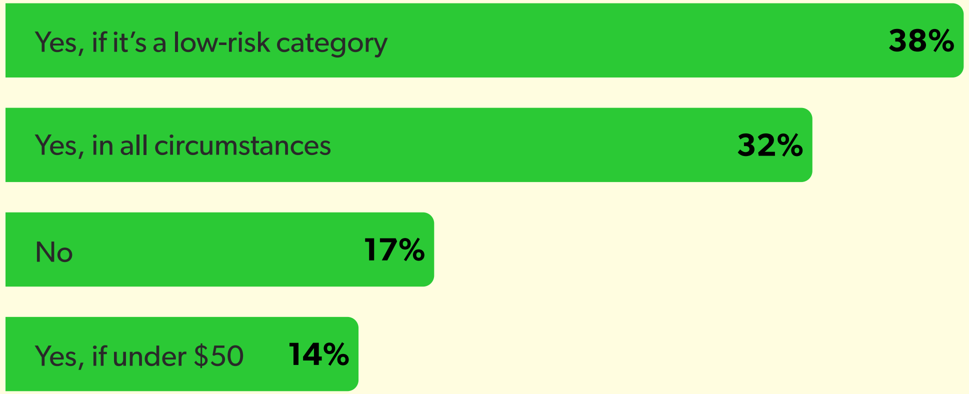
But that doesn't mean they aren't wary of AI product recommendations.

54% believe that if they've seen a brand ad inside an AI tool, that brand is more likely to get recommended by the same tool.

An AI recommendation doesn't arrive with a blank slate of trust attached. Shoppers are already asking themselves: Is this actually the best option, or just the default or promoted one?

That skepticism hasn't stopped people from using AI tools to shop. But it changes what being recommended by AI actually means for a brand. Only 32% of shoppers say they're comfortable buying from a completely unknown brand in any circumstance; 38% are comfortable if it's a product in a low-risk category, and 17% aren't comfortable with it, ever.

HOW COMFORTABLE ARE SHOPPERS BUYING AN UNFAMILIAR BRAND ON AI'S WORD ALONE?



Based on this data, we can see that while comfort with AI recommendations is growing, it's conditional, and the condition is almost always: prove it. This is where a lot of brands stop too early. Being surfaced by AI is the opening move, not the close.

A recognizable brand with strong equity doesn't guarantee an AI recommendation, but it makes a shopper far more willing to extend trust if appears, and far less likely to second-guess it afterward.

AI can only use signals it can access. Many of the signals AI depends on most when surfacing recommendations are contained in reviews and other user-generated content. If that UGC is locked behind JavaScript that some AI crawlers can't access, that proof might as well not exist. (Bazaarvoice's Authentic Discovery API™ is built to close this gap, making review content directly readable by AI crawlers.)

Brands across all categories face a new reality of AI shopping assistants acting as highly influential salespeople—for better or worse. Brands in low-consideration categories specifically may not get a second chance at the sale.

> Brand trust increasingly needs to come from places other than the brand itself—consumers want unbiased opinions. LLMs read reviews differently than people do, scanning at a scale that surfaces patterns a human never would. How a brand shows up everywhere has never mattered more for winning customers.

ASH MCMULLEN

Head of E-Commerce, Advantice Health

2 THE FIRST CLICK

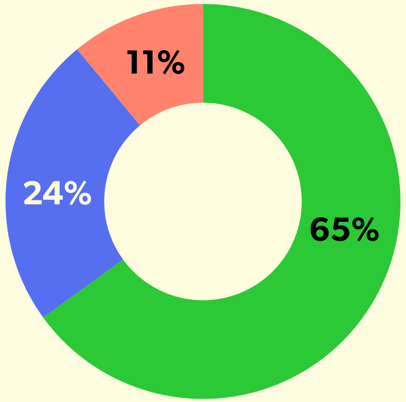
The clearest finding in this entire study is another vote for brand equity: When AI recommends several options to a shopper, that recognizable, trusted brand wins the first click almost two-thirds of the time.

65% of shoppers click the brand they already know and trust first—more than double the number who click whatever AI marks as the "best match" (24%), and nearly six times the number who click on price alone (11%).

HOW OFTEN DOES FAMILIARITY WIN THE FIRST CLICK IN AI INTERFACES?

Percent of shoppers who reach for the brand they already trust when AI offers multiple product options

- Brand I already know and trust
- Option marked "best match" by AI
- Option with the lowest price



Brand equity, in other words, still functions as a gate. Before most shoppers will seriously engage with an AI-surfaced option, it has to clear a basic bar: Is this a brand I already believe in?

That gate isn't completely uniform. It depends on category. In beauty & personal care, familiarity is most important—69% click the known brand first. DIY & home improvement sits at the other end among major categories, at 56%—still a clear majority, but with more room for an AI "best match" (27%) to break through.

> AI assistants can take an unlimited universe of products and narrow down to the cheapest or the one with the most utility. But consumers aren't willing to make an immediate trade on price or features alone. This is exactly where brand equity comes into play: Consumers still gravitate to brands they trust.

HOW STRONG IS THE FIRST-CLICK ADVANTAGE, BY CATEGORY?

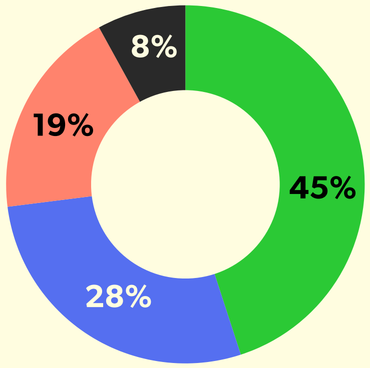
Beauty & personal care	69%
Apparel, footwear & accessories	66%
Electronics & appliances	64%
Baby, kids & toys	61%
Pet care	61%
Home & kitchen furnishings	60%
Food & beverage	57%
DIY & home improvement	56%

But why does the gate hold at all? When we asked shoppers directly why they stick with a brand they buy repeatedly, the top answer wasn't habit. It's performance.

45% say they stay because the product performs better than competitors; while only 8% cite pure habit, being a "household name I've used for years."

WHY SHOPPERS REPEATEDLY BUY FROM THE SAME BRAND

- Products perform better than competitors
- I love their brand values and what they stand for
- Priced reasonably for the quality
- Household name I've used for years



Brand loyalty, as indicated in this data, is an earned, ongoing verdict based on performance.

What's more: When we asked whether a higher price from a well-known brand feels like a "guarantee of quality" or an "unnecessary marketing tax," only 22% called it a tax outright. 34% called it a genuine guarantee, and the largest group, 45%, said it depends on the purchase.

It's revealing that almost half of shoppers said "it depends." This response suggested a flexible mindset, extending real trust to premium pricing on some products, while staying skeptical of the same premium on others.

Consumers aren't choosing products simply because it's the brand they grew up with. They are more discerning, and at least attributing their preferences to performance attributes. This is an opportunity for brands to re-define their point of difference, especially if they aren't the current category incumbent.

This confirms what we see everyday at U Beauty: Shoppers don't stay loyal out of nostalgia, they stay because a product actually delivers. The brands that treat loyalty as something to re-earn with every purchase, rather than something they've inherited, are the ones that will hold their ground as AI reshapes how people discover products.

AJ PATEL

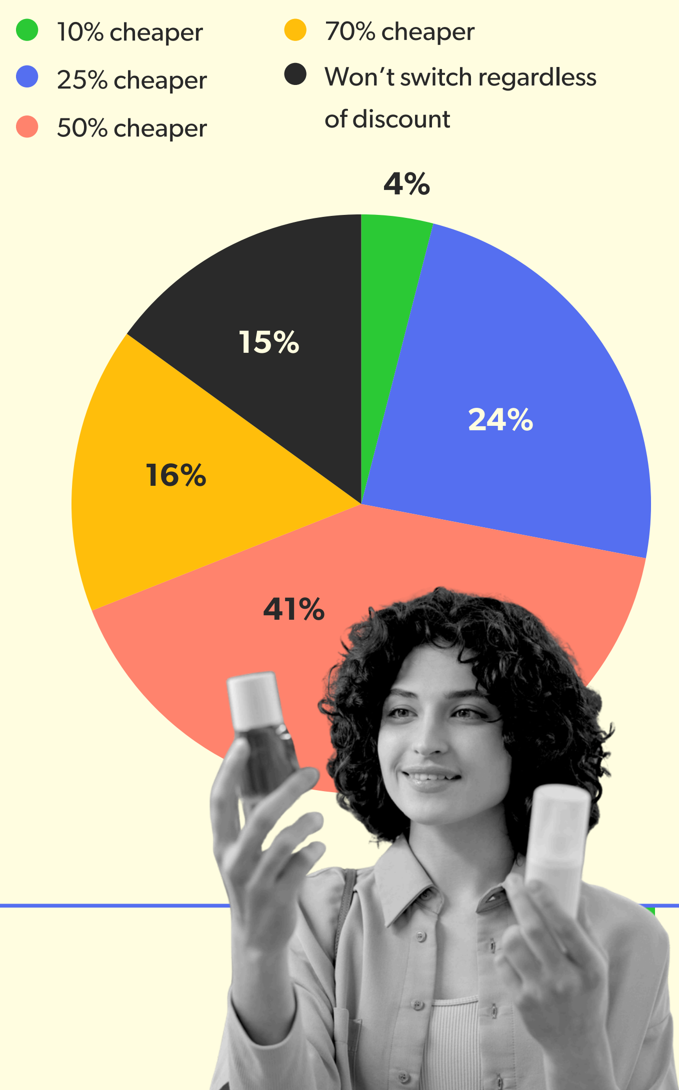
SVP of Global Growth, U Beauty

3 THE PROOF POINT

If Section 2 is about brands shoppers already trust, this section is about everyone else—the unfamiliar names, the challenger brands, the products AI surfaces that a shopper has never heard of before. This is where real opportunity, and real risk, sits for most of the brands reading this report.

Let's start with the good news: shoppers are not nearly as quick to abandon a trusted brand as the "race to the bottom" narrative suggests—the fear that AI will flatten every purchase decision into a hunt for the lowest price, regardless of brand. When offered a highly-rated "dupe" of their go-to product on sale, only 4% would switch for a mere 10% discount. It takes a 50% discount to move the largest group (41%), and 15% say they won't switch regardless of the discount, at any price. Loyalty has a real cost to overcome, and most shoppers won't budge for a small discount.

HOW MUCH CHEAPER DOES A DUPE NEED TO BE BEFORE SHOPPERS SWITCH?

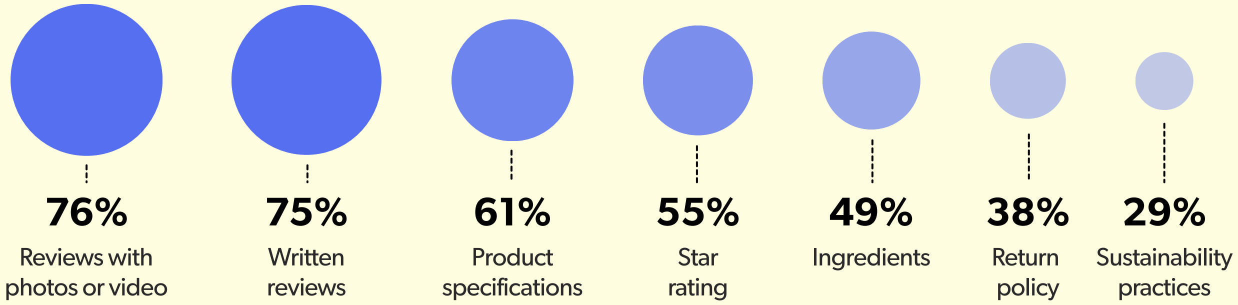


> “ Beauty is about the most dupe saturated category there is, so it's reassuring that a cheaper lookalike doesn't win by default. It's also a challenge to us: The premium we charge at U Beauty has to be backed by a real, provable performance difference. When it is, shoppers will pay to stay.
>
> **AJ PATEL** | SVP OF GLOBAL GROWTH, U BEAUTY

The catch is that this loyalty isn't transferable, and that matters most if you operate more than one brand. The protection a flagship brand earns with its loyal customers doesn't carry over to a newer or smaller brand in the same portfolio. To shoppers who've never heard of it, that second brand is exactly the unfamiliar option this section is about, no matter how established its parent company is.

When shoppers are deciding whether to trust an AI-recommended brand they don't know, they turn overwhelmingly to human proof: 76% want reviews with photos or video, 75% want written reviews, 61% want product specs, and 55% want star ratings before they'll commit.

WHAT SHOPPERS NEED TO SEE BEFORE TRUSTING AN UNFAMILIAR AI-RECOMMENDED BRAND



Reviews, ratings, and photos aren't just nice-to-haves for a product page anymore—they're the specific evidence AI-era shoppers need before trusting an unfamiliar brand. Making sure that content is accessible, authentic, and abundant to both the AI shopping agents and human shoppers that depend on it is quickly becoming table stakes for competing in AI interfaces.

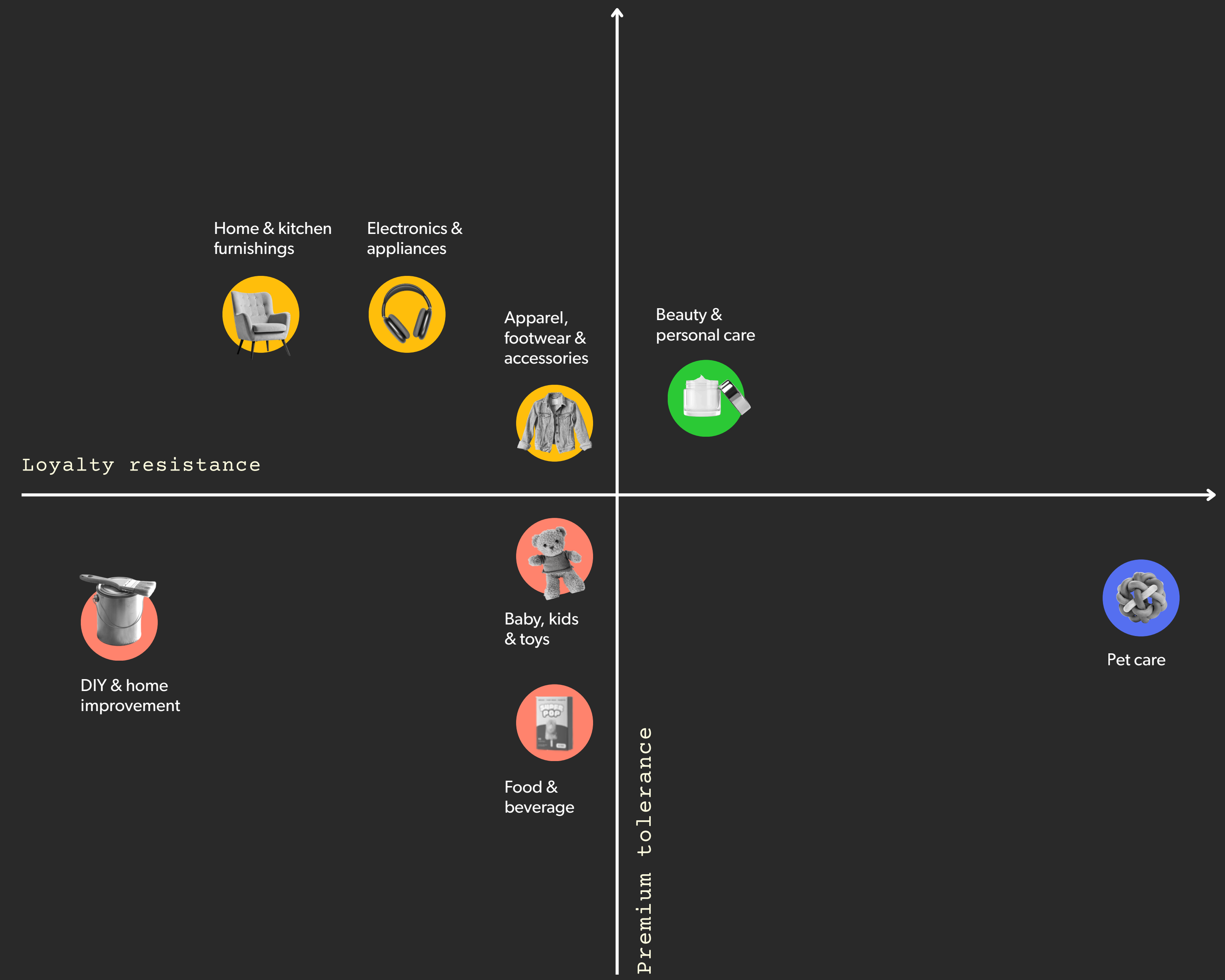
Learn more about this in our product discoverability playbook for brand leaders.

LOCATING YOUR BRAND

The proof-and-loyalty matrix

Not every category faces the same risk profile, and not every category needs the same response. To help you locate your own brand, we looked at two data points across the eight categories in this study:

- How fiercely loyal shoppers are (the share who say they won't switch to a cheaper alternative, regardless of the discount)
- How much of a premium shoppers are willing to pay to stick with a trusted brand



Every category has different levers for trust, and different layers of urgency at that. Ranging from a relatively innocuous, “How durable are these Bluetooth headphones?” to the existential, “Are these children’s pajamas fire-resistant?” But regardless of category, the price discount that consumers require to switch from known brands is substantial. This should comfort incumbent brands—but only if they have extreme confidence in their value proposition and enduring brand equity.

Premium but exposed

(lower loyalty resistance, higher premium tolerance)

Apparel, electronics & appliances, and home & kitchen furnishings land here. Shoppers respect these brands enough to pay more for them, but that doesn’t fully protect against a good deal. These categories reward brands that pair premium positioning with strong proof, not premium positioning alone.

Loyal and rewarded

(higher loyalty resistance, higher premium tolerance)

Beauty & personal care sit here alone. Shoppers in this category are both reluctant to switch and willing to pay more to avoid it. Brand equity is doing real, measurable work.

Open and price-driven

(lower loyalty resistance, lower premium tolerance)

DIY & home improvement, food & beverage, and baby, kids & toys sit here. These are the categories most exposed to a well-proven challenger or dupe, and where investment in proof content likely returns the most, dollar for dollar.

Loyal but frugal

(higher loyalty resistance, lower premium tolerance)

Pet care shows this pattern most clearly (23% won’t switch regardless of discount, despite a modest willingness to pay a premium). These shoppers are hard to conquest, but they’re not paying for the logo—they’re paying for confidence in what’s inside the package, which tracks with the fact that this category also shows the single highest demand for photo and video proof (85%) of any category measured.

“Brand loyalty is heavily dictated by category risk/reward. In low-ticket categories like food & beverage, price elasticity can more easily trump equity because the risk is minimal; if a consumer tries an unfamiliar brand and doesn’t like it, they can switch back on the next shopping trip. This doesn’t hold as true for high-ticket purchases, like appliances or electronics, where consumers demand far more proof before purchase.

KIM MCDERMOTT

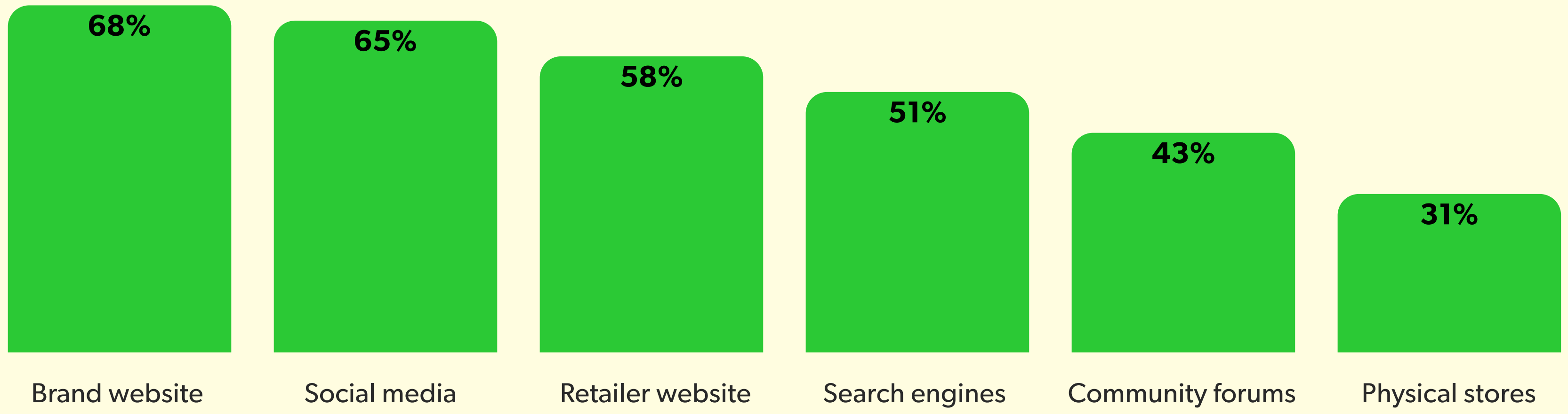
Senior Brand Manager, Egglife Foods

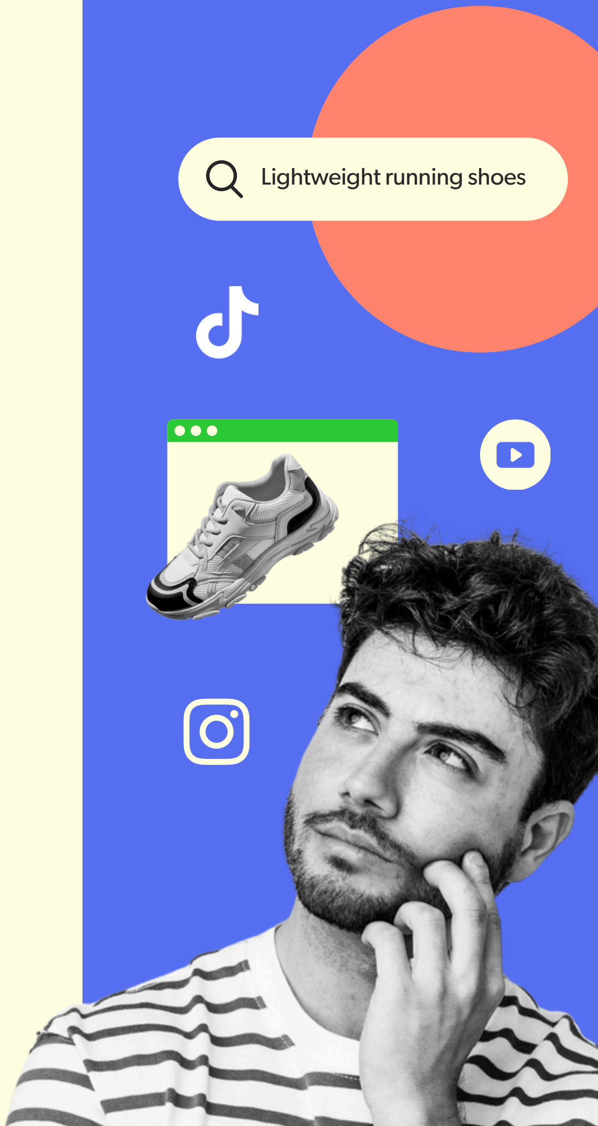
4 THE DOUBLE-CHECK

An AI recommendation doesn't end the research process.
For most shoppers, it starts a new one.

After deciding to potentially buy an AI-recommended product, 68% go to the brand's website to look further. 65% check social media. 58% visit a retailer's website. Whatever AI compresses on the way in, shoppers decompress again on the way out—verifying across the same wide set of channels they've always used to build confidence in a purchase.

WHERE SHOPPERS GO TO DOUBLE-CHECK AN AI RECOMMENDATION BEFORE BUYING

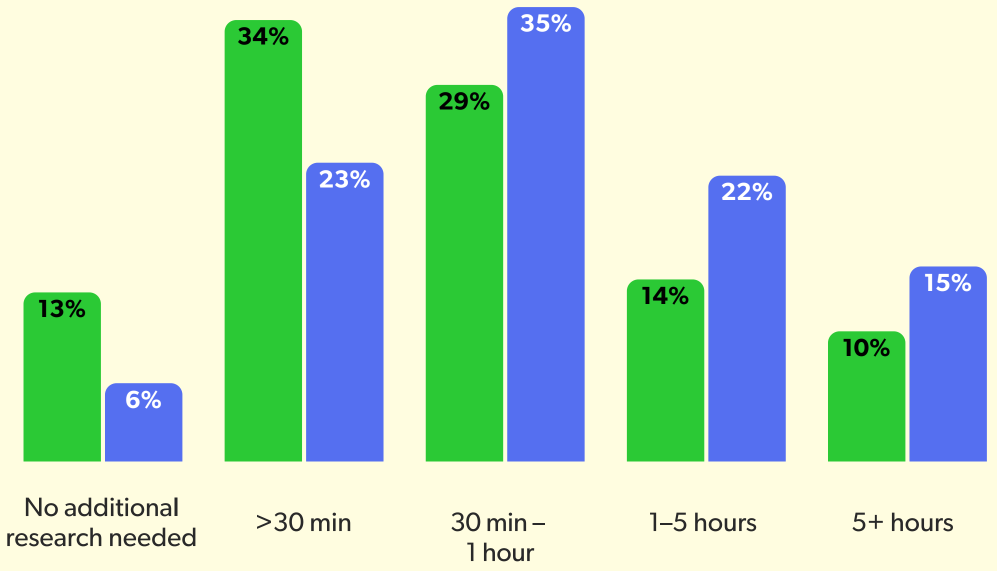




What's more: When AI recommends a product from a brand a shopper already trusts, 34% spend less than 30 minutes confirming it, and 13% do no further research at all. When AI recommends a product from a brand they don't know, that "no research needed" group drops to 6%, and the largest group spends 30 minutes to a full hour researching before they'll commit.

For brand marketers, the takeaway isn't that AI recommendations are somehow weak or unpersuasive. It's that an AI recommendation is the beginning of a shopper's confidence-building process—not the whole thing. And every one of the channels a shopper turns to next (your website, social, a retailer's website) is a channel you can shape.

RESEARCH TIME BEFORE BUYING:
KNOWN BRAND VS. UNFAMILIAR BRAND

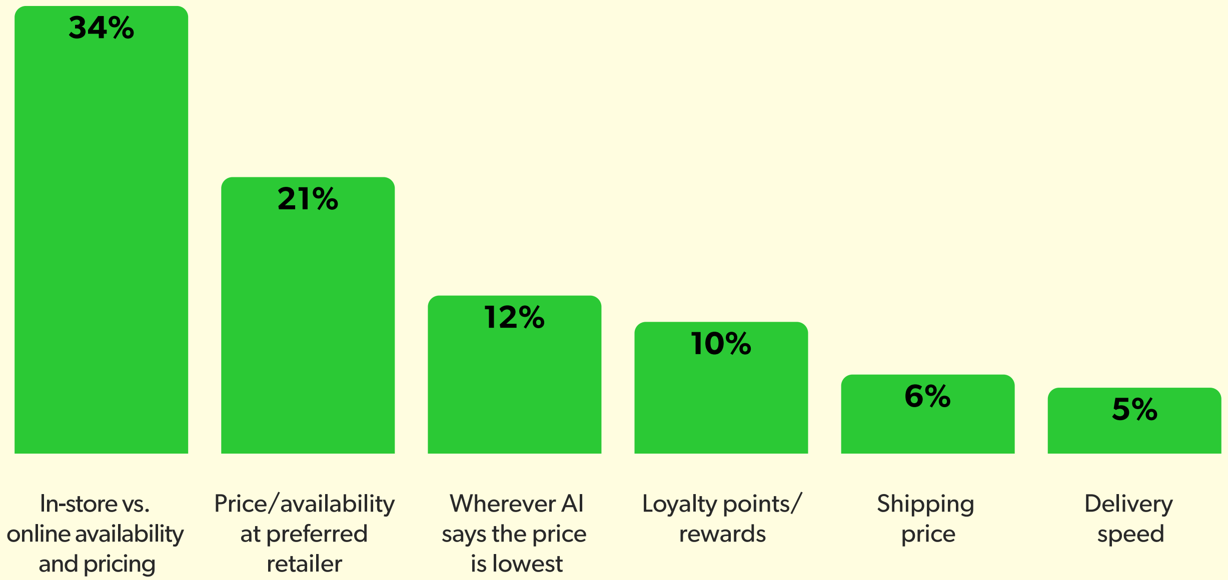


It's not that consumers aren't open to switching brands. They wouldn't be opening the door and having the conversation with AI if they weren't. The lesson is that consumers do more homework on the brands they don't recognize. Understanding the trusted sources for this manual homework, which may differ from what sources the AI models are pulling from,is what will give challenger brands an edge.

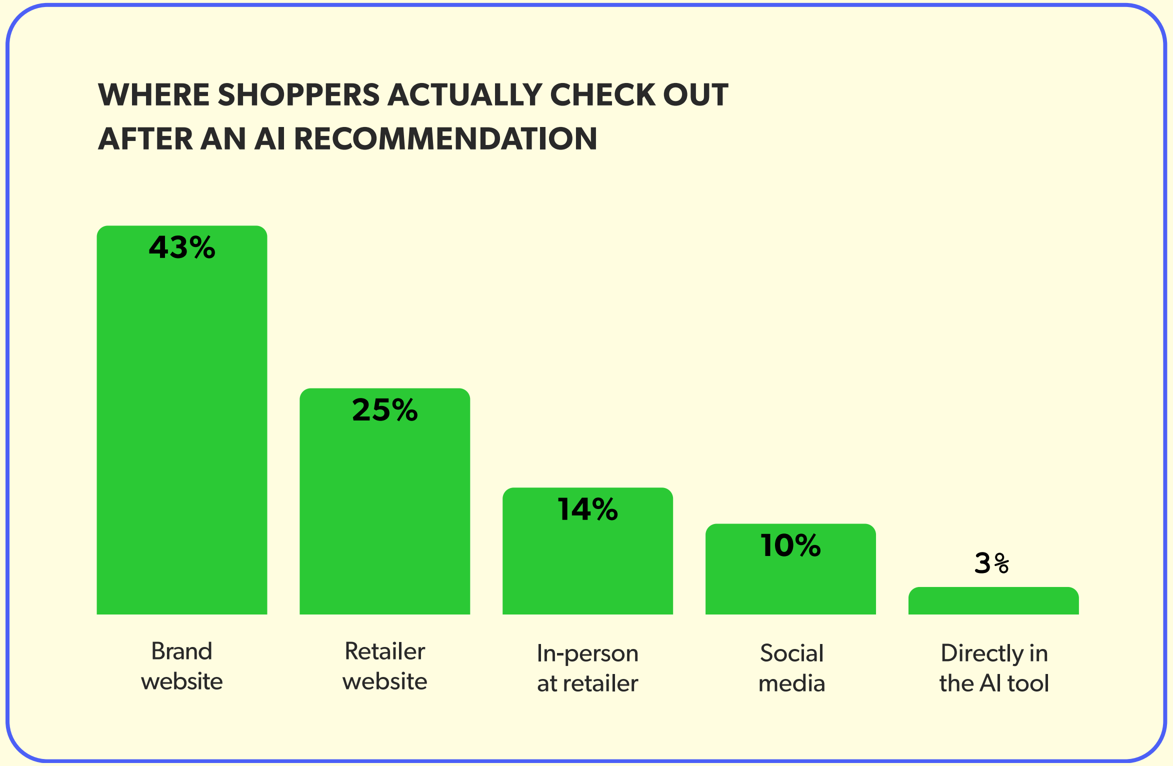
5 THE CHECKOUT

If AI were truly collapsing the shopping journey into a single, frictionless “recommend and buy“ motion, we’d expect checkout behavior to follow AI’s lead completely. It doesn’t.

WHAT MATTERS TO SHOPPERS WHEN CHOOSING WHERE TO CHECK OUT AFTER AN AI RECOMMENDATION



When a shopper is choosing where to actually complete a purchase after an AI recommendation, the single biggest factor is in-store versus online availability and pricing (34%). Only 12% say they’ll simply buy wherever AI says the price is lowest. Again, according to this data, the “race to the bottom“ narrative seems unsupported at this point.



The more striking finding is this: Once a shopper knows what they want to buy, 43% ultimately check out on the brand's own website—more than retailer websites (25%), in-person retail (14%), or any other channel, including checking out directly inside the AI tool itself, which draws just 3%. The adoption of AI tools, then, is not routing shoppers away from brand-owned commerce—at least, not yet. If anything, it's reinforcing the role brand.com already plays as a trusted destination once a decision is made.

That's a meaningful data point for any brand marketer being asked to justify continued investment in owned digital commerce infrastructure, at a moment when budget conversations increasingly pull toward retail media and marketplace spend. This data doesn't argue against those channels, but it does argue that AI shopping interfaces haven't diminished the case for a strong brand.com experience. If anything, it raises the stakes on making sure that destination is ready to close the sale once AI sends a shopper looking for it.

> The advice to "be everywhere" continues to ring true when it comes to distribution—consumers want to transact on their terms and in a way that fits into their lifestyle. In order to win, brands need to win everywhere. But if you simply had to pick where to invest first, this finding suggests the brand website should be the priority. It also has the benefit of being the most controllable surface, and un-conquestable by competitors with deeper pockets.

> Much like the rise of social media transformed how brands built awareness and engagement, AI discovery is reinforcing the role of a brand's website as a critical source of trust and validation, influencing decisions across the entire retail ecosystem.

JULIE LIU

Director of Digital Commerce, Ghirardelli Chocolate Company

YOUR MOVE

Every section in this report points back to the same underlying idea: AI hasn't taken brand equity out of the shopping journey, but it has put it to a harder, faster test. And it's one that plays out in a matter of seconds, inside an interface built to minimize brand signal, in front of a shopper who is constantly deciding whether to extend trust or withhold it.

The tools that help win this test aren't unfamiliar: real customer voices captured in reviews and other UGC, and a brand.com experience shoppers trust. Most brand marketers already have the foundation of this infrastructure in place today. The opportunity is in optimizing the assets you already have, ensuring they work harder and faster the moment AI puts your brand to the test.

> With AI assistants by their side, shoppers have never been more educated and discerning than they are today. For brands willing to meet this savvy shopper where they are, there is great opportunity.
>
> Just as in the past, there are no easy shortcuts today: You can buy merchandising space with retailers, which comes at a price. You can optimize for placement in AI models, which are erratic.
>
> Enduring trust is hard to build, and easy to lose. But it does put brands in a protected class in the shoppers' mind, regardless of the role that AI plays in the buying decision.

One final note before we close: this report reflects a single point in time. AI-mediated shopping is evolving rapidly—some of these numbers will hold, some will shift, and some of what feels certain today may look different a year from now. We built this study to be part of the first wave of an ongoing research effort. We'll be back with what's changed.

> “This research reinforces that trust remains incredibly important in the shopping journey. Consumers are still looking for confidence that a product will meet their needs and deliver on its promise. The brands that succeed will be the ones that stay focused on understanding those needs and ensuring consumers can easily find the product information, reviews, and proof points they need to make confident decisions.

TIFFANY TAN

Head of E-Commerce Growth Accelerator, The Clorox Company