

JUNE 2026

The Algorithmic Aisle

How AI Will Change What Consumers Buy, Trust, and Ignore



METHODOLOGY

About this research

AI is becoming a new layer between consumers and CPG brands. The battleground is no longer only the shelf, search results, advertising, or habit — it is whether brands are visible, trusted, explainable, and recommendable within AI-powered shopping environments.

3222

4

3

Adults

Ages 18+, nationally representative

Markets

Spanning the US, UK, Brazil, and India

Key CPG Categories

Beauty & Wellness, Personal Care, and Household Goods

SECTION 1

AI at the Shelf

AI AT THE SHELF

AI at the Shelf

AI is beginning to enter the shopping journey, but **consumers are not ready to hand over product decisions completely.**

The opportunity is not full automation; it is **trusted assistance.**



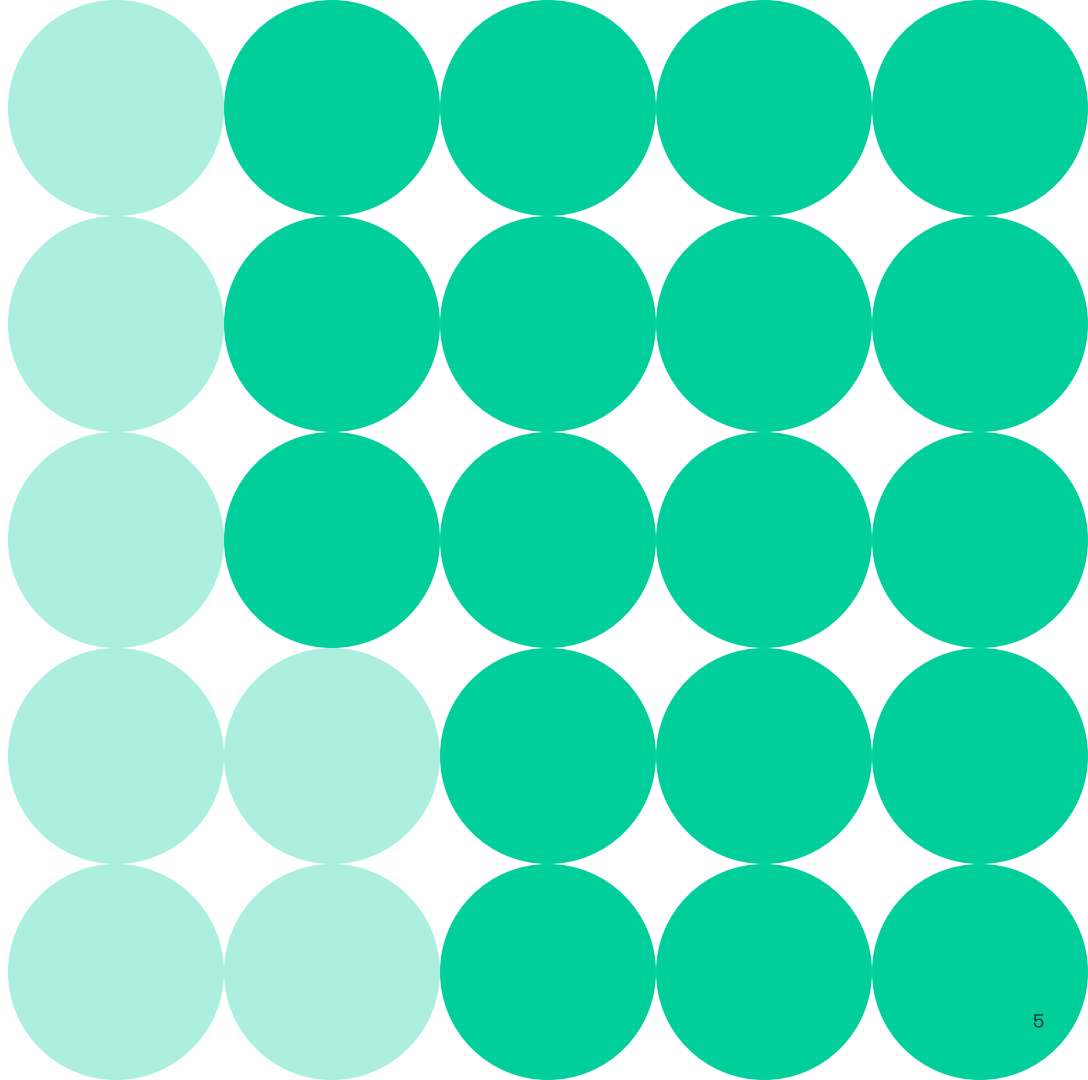
AI AT THE SHELF

AI is welcome in the aisle, but not in the driver's seat

AI's permission space in shopping is conditional. Consumers welcome AI as a support tool, but they're not ready to fully relinquish control. For brands and retailers, the near-term opportunity is to design AI as a decision-support layer, not a decision-replacement layer.

72%

Of global consumers are comfortable with AI helping them shop as long as they make the final decision.



The most valuable AI use cases solve real shopping friction

For consumers, the sweet spot is when AI helps reduce friction; comparison, filtering and explanation are the strongest permission spaces.



Brazil over-indexes on several friction-solving use cases: **83%** are comfortable with AI comparing prices, significantly higher than the U.S. and U.K.

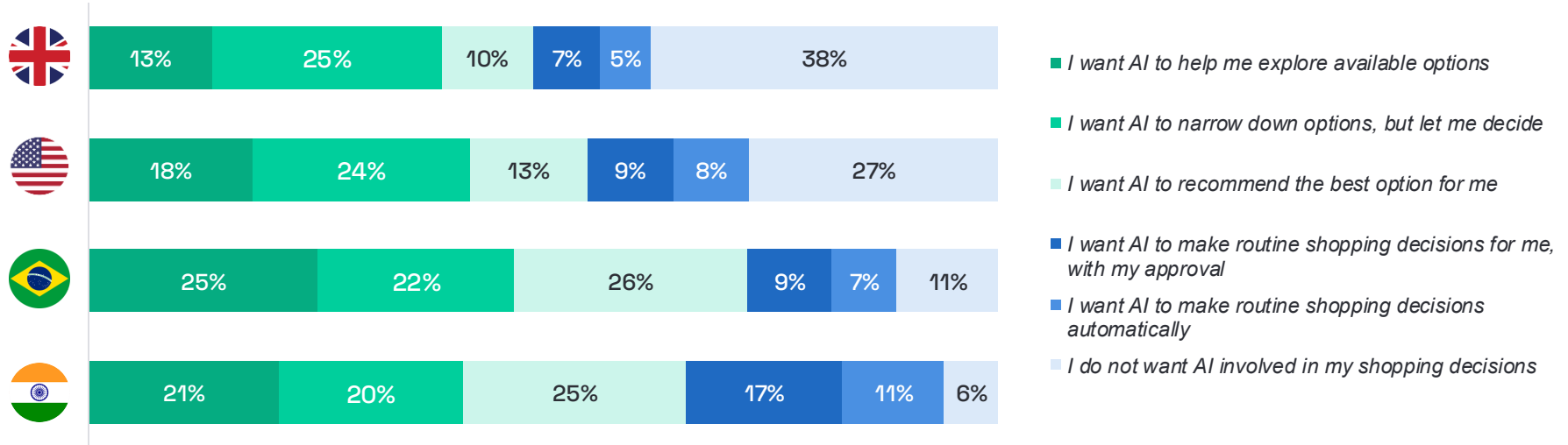
Comfort with AI-assisted shopping tasks (% Agree, T2B)



The role of AI is culturally uneven

AI shopping adoption will require market-specific calibration: India and Brazil show greater appetite for AI-led recommendations, while the UK is far more likely to reject AI involvement altogether.

Preferred Role of AI When Shopping by Country



AI shopping has a trust problem

Consumers may see the utility of AI, but they aren't assuming AI recommendations are neutral, objective, or in their best interest.

The trust risk is concentrated around three concerns: paid influence, premium bias, and algorithmic narrowing. Consumers worry AI may not expand choice but rather quietly limit what they see.

72%

worry that AI will limit what they see instead of expanding their choices.

74%

would be skeptical of AI if it mostly recommended premium or expensive products.

76%

would lose trust in a retailer if its AI recommended sponsored products without making that clear.

78%

assume brands will try to pay their way into AI recommendations.

AI AT THE SHELF

Trust will be built by showing the work

AI recommendations become more credible when consumers can see the logic behind them: pros and cons, explanation, reviews, evidence, and how the recommendation compares to their usual choice.



*The U.K. is hardest to persuade: **28%** say nothing would make them trust AI recommendations, significantly higher than the U.S., Brazil, and India.*

29%

want AI to **clearly explain why the product is being recommended.**

29%

want AI to use **verified customer reviews.**



31%

say AI recommendations would be more trustworthy if they show **both pros and cons.**

+/-

AI AT THE SHELF

Transparency around paid influence is non-negotiable

Consumers already expect brands to influence AI. The risk is not paid placement itself; it is hidden paid placement. In AI commerce, undisclosed sponsorship is a direct threat to retailer and platform trust.



The U.K. is especially disclosure-oriented: 52% say platforms should disclose whether a recommendation was paid or sponsored, significantly higher than Brazil and India.

45%

say AI platforms should be required to disclose whether a product recommendation was ***paid for or sponsored***.

31%

want disclosure on whether the recommendation ***favored retailer-owned or private-label products***

29%

want disclosure ***whether the brand paid for higher visibility***

AI must go "glocal"

Consumers want AI recommendations that reflect the realities of their market: local prices, product availability, reviews from people in their country, household needs, climate, language, and cultural preferences.



India is especially strong on local context: **45%** want AI to understand products available in their country, and **42%** want reviews from people in their country, both significantly higher than the U.S. and U.K.



Brazil is significantly more likely than India and the U.K. to consider local prices and promotions relevant (**48%**).

72%

worry that AI will limit what they see instead of expanding their choices.

78%

assume brands will try to pay their way into AI recommendations.

74%

would be skeptical of AI if it mostly suggest premium or expensive products.



AI AT THE SHELF

While AI can make shopping easier, it can also make it less enjoyable

Efficiency cannot come at the expense of discovery.

AI can reduce the burden of choice, but shopping is not always purely functional. Consumers still value browsing, comparison, discovery, and personal judgment, especially when products feel personal, identity-linked, or enjoyable to choose.



73%

Of global consumers
agree that shopping would
feel less fun if AI did too much
of the choosing for me.

AI AT THE SHELF

AI creates a discovery paradox

AI can help consumers discover unfamiliar brands, but it also risks becoming a new gatekeeper that determines which products make it into consideration.

Source: Harris Poll Thought Leadership, The Algorithmic Aisle, June 2026

AI as Discovery Engine

71%

Are comfortable using AI to discover new or emerging brands.

66%

Would consider switching to a product better suited to their needs, even if they hadn't heard of the brand.

AI as Gatekeeper

72%

Worry AI will limit what they see instead of expanding their choices.

61%

Would be less likely to notice a brand if AI does not recommend it

AI AT THE SHELF

AI permission depends on category sensitivity

AI will not reshape every CPG category equally. Its strongest role is in categories where consumers need help comparing options, navigating personal needs, managing routines, or simplifying repeat purchases.



India is significantly more comfortable across categories. For personal care, comfort reaches **89% India vs. 68% U.S. and 50% U.K.** For household care, **86% India vs. 70% U.S. and 58% U.K.** The U.K. is consistently the least comfortable.

Comfort with AI Recommendations by Product Category (T2B %)

Shopping Category	Total	US	Brazil	India	UK
<i>Beauty or skincare products</i>	73%	71%	82%	82%	56%
<i>Paper products</i>	73%	72%	83%	85%	58%
<i>Household care products</i>	72%	70%	80%	86%	58%
<i>Pet food or pet care products</i>	72%	68%	80%	86%	59%
<i>Personal care products</i>	71%	68%	81%	89%	50%
<i>Non-alcoholic beverages</i>	70%	69%	80%	83%	54%
<i>Snacks or frozen treats</i>	70%	67%	80%	83%	55%
<i>Food products</i>	67%	66%	77%	81%	50%
<i>OTC health products</i>	63%	63%	70%	76%	47%

The rules of the algorithmic aisle

Winning in AI commerce means being visible, explainable, provable, and trusted before the shopper ever reaches the shelf.

01.

Design for assisted choice, not full delegation

Consumers want AI to help, but they still want final control.

02.

Make product information AI- and shopper-ready

AI needs structured product data, but consumers need clear explanations.

03.

Treat disclosure as a trust requirement

Sponsored recommendations and paid placements must be clearly labeled.

04.

Build proof into the recommendation environment

Claims, reviews, expert support, certifications, and evidence should be easy for AI to surface.

05.

Localize AI relevance by market

AI recommendations need to reflect local pricing, culture, categories, and shopping norms.

06.

Prepare for AI as both discovery engine and gatekeeper

Brands must understand how to win visibility when AI filters the shelf.

SECTION 2

AI as the New Beauty Advisor

AI AS THE NEW BEAUTY ADVISOR

The new beauty advisor needs emotional intelligence

Beauty is one of the strongest permission spaces for AI because consumers already need help navigating product fit, routines, ingredients, claims, reviews, and budget.

But beauty is also uniquely sensitive:

it touches identity, appearance, confidence, insecurity, and inclusion. To earn trust, AI must make consumers feel more confident, not more judged.

Source: Harris Poll Thought Leadership,
The Algorithmic Aisle, June 2026



85%

agree AI beauty suggestions should help people feel confident, not judged.

AI AS THE NEW BEAUTY ADVISOR

AI's beauty sweet spot is research, not selection

The most useful AI tasks are research-oriented: summarizing reviews, finding value, decoding ingredients, comparing claims, and setting expectations.

Consumers see AI's strongest role as helping them make sense of a crowded beauty aisle.

The highest-value use cases solve existing pain points: too many products, too many claims, too many reviews, and too much uncertainty about what will actually work.

Usefulness of AI across beauty shopping tasks (T2B %)



Beauty trust is highest where AI can explain fit and function

For beauty leaders, the **opportunity is strongest where AI can explain fit and function** — but higher-sensitivity categories will require more proof, transparency, and reassurance.

Trust in AI-generated recommendations by Beauty Category (T2B %)

Beauty Category	Total	United States	Brazil	India	United Kingdom
Moisturizer	76%	74%	83%	86%	60%
Sunscreen	75%	72%	83%	84%	61%
Beauty tools or accessories	73%	69%	82%	85%	54%
Facial cleanser	73%	69%	79%	85%	56%
Fragrance	72%	66%	80%	87%	55%
Anti-aging skincare products	71%	67%	81%	80%	54%
Products for sensitive skin	69%	67%	75%	81%	53%
Lipstick or lip color	68%	62%	78%	80%	49%
Foundation or concealer	67%	63%	75%	80%	48%
Hair color	66%	58%	77%	78%	48%
Acne or blemish treatment	65%	59%	77%	78%	46%

Beauty trust is highest where AI can explain function

For beauty leaders, the opportunity is strongest where AI can explain function — but higher-seniority categories will require more transparency, and reassurance.

Trust in AI-generated recommendations



Routine skincare is the entry point

Moisturizer and sunscreen lead overall, suggesting consumers are most willing to trust AI where the decision feels functional, familiar, and explainable.



India and Brazil can support bolder AI experiences

Higher trust across nearly every beauty category points to greater permission for AI-led discovery, personalization, and recommendation in these markets.



UK is the Caution Market

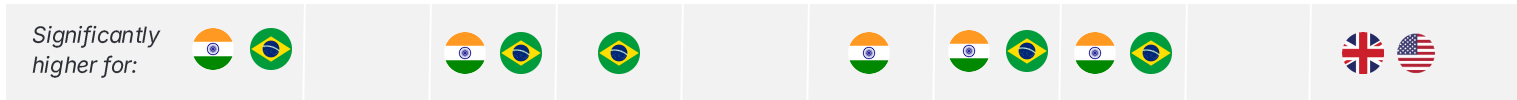
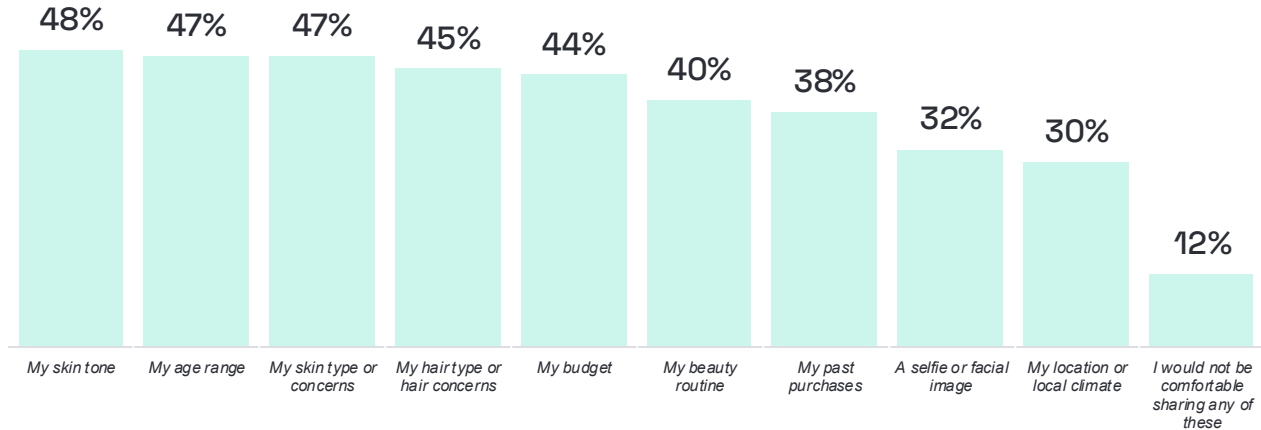
Lower trust across all tested categories signals the need to lead with transparency, human override, expert proof, and clear boundaries around personal data.

	United States	Brazil	India	United Kingdom
Moisturizer	74%	83%	86%	60%
Sunscreen	75%	83%	84%	61%
Skincare	69%	82%	85%	54%
Deodorant	69%	79%	85%	56%
Body care	66%	80%	87%	55%
Hair care	67%	81%	80%	54%
Products for sensitive skin	69%	75%	81%	53%
Beauty	62%	78%	80%	49%
Skincare	63%	75%	80%	48%
Deodorant	68%	77%	78%	48%
Body care	69%	77%	78%	46%

Beauty AI has to *earn* deeper data

Consumers will share basic fit signals to get better recommendations, but comfort drops as data becomes more personal, visual, or behavior-based.

Comfort sharing data with AI beauty tools



AI AS THE NEW BEAUTY ADVISOR

The biggest beauty AI concern is hidden influence

The leading concern is commercial bias:

Consumers worry AI beauty recommendations may be shaped by paid placement. But they are also concerned about wrong-fit recommendations, unexpected data use, misreading personal features, and beauty becoming too standardized.



39%

Worry AI might recommend products that are not right for my skin or hair

34%

Are concerned it might make beauty feel too standardized



43%

Worry AI might recommend beauty products based on paid placement



AI AS THE NEW BEAUTY ADVISOR

And emotional safety is where they draw the line

The same tool that feels helpful when it recommends a product for dry skin can feel intrusive if it diagnoses, judges, or stores visual data without consent.

The line between personalization and invasion is thin in beauty. The design principle should be: ask before analyzing, explain before recommending, and never frame the consumer as something to be fixed.

What Makes AI Beauty Recommendations Feel Invasive:



42%

if it suggested I need to "fix" something about how I look



43%

if it used my image or selfie in a way I did not expect



44%

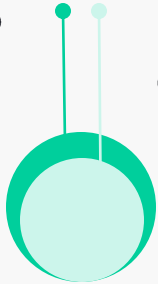
if it stored or shared personal information without clear consent

Especially as it relates to inclusivity

If AI beauty tools are not visibly tested across diverse consumers, they risk reinforcing existing gaps in beauty representation and product fit. Consumers want evidence that the technology understands people like them.

77%

India



Global

I worry that AI beauty tools are not designed equally well for people like me.

85%

Brazil

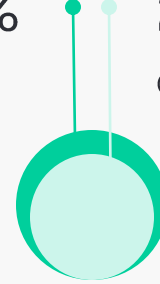


Global

I would trust AI beauty recommendations more if the tool had been tested across different skin tones, hair types, ages, and genders.

43%

U.K.



Global

Do not believe AI can make beauty shopping feel more personalized than shopping in-store

AI AS THE NEW BEAUTY ADVISOR

The AI beauty mandate:

*Confidence
before
customization*

#1

Start with research, then earn the right to recommend

AI's strongest near-term role is helping consumers decode the beauty aisle: reviews, ingredients, claims, expected results, and value. Brands should lead with decision support before pushing deeper personalization or automated recommendations.

#2

Build AI experiences that increase confidence, not insecurity

Beauty AI will fail if it feels judgmental, diagnostic, or corrective in the wrong way. The tone of the experience matters as much as the recommendation.

#3

Make paid influence impossible to miss

The biggest concern is that AI will recommend what is paid for, not what is right. Beauty brands and retailers need transparent disclosure models before sponsored AI recommendations become a trust liability.

#4

Prove the tool works across real beauty diversity

Inclusive testing is central to AI beauty credibility. Consumers want reassurance that tools work across skin tones, hair types, ages, genders, and beauty needs.

SECTION 3

AI as the Personal Care Navigator

AI AS THE PERSONAL CARE NAVIGATOR

Personal care is AI-ready, but body-level trust is the hurdle

Consumers see clear value in AI helping them navigate personal care, especially when it cuts through confusing claims, ingredients, and product differences.

But personal care products touch the body, hygiene, health-adjacent needs, sensitive concerns, family routines, and identity. **That makes the opportunity strong and the permission model more delicate.**



75%

agree AI could make personal care shopping easier by cutting through confusing claims and ingredients

The closer AI gets to the body, the higher the trust bar

Start AI guidance in high-trust daily routines, then **earn permission before moving into more sensitive body, family, or health-adjacent needs.**



India and Brazil show consistently higher trust across every personal care category, while the U.K. trails sharply — especially in sensitive categories like menstrual care, family products, and skin concerns.

Trust in AI-generated recommendations by Personal Care Category (T2B %)

Personal Care Category	Total	United States	Brazil	India	United Kingdom
<i>Body wash or soap</i>	75%	70%	89%	87%	58%
<i>Toothpaste</i>	74%	71%	84%	85%	59%
<i>Shampoo or conditioner</i>	74%	72%	83%	87%	58%
<i>Deodorant or antiperspirant</i>	73%	73%	85%	82%	56%
<i>Body lotion or moisturizer</i>	72%	71%	84%	84%	52%
<i>Mouthwash or other oral care products</i>	71%	71%	84%	80%	54%
<i>Shaving or grooming products</i>	70%	69%	84%	83%	50%
<i>Products for dandruff, acne, or other specific concerns</i>	66%	63%	77%	82%	47%
<i>Products for sensitive skin</i>	66%	64%	74%	82%	48%
<i>Products for children or family members</i>	62%	56%	73%	82%	40%
<i>Menstrual care products</i>	57%	50%	68%	80%	37%

Trust is especially fragile when it assumes too much

The personal care invasion line is clear: consumers do not want AI to infer intimate needs they have not disclosed. The risk is not just privacy. It is embarrassment, judgment, and the feeling that AI has overstepped into the body.

79%

would be uncomfortable if AI guessed personal care needs they had not directly told it.

43%

say it would feel invasive if AI guessed something about their body without them telling it.

38%

say it would feel invasive if AI inferred a health issue from shopping behavior.

38%

say it would feel invasive if AI recommended products for sensitive issues without clear permission.

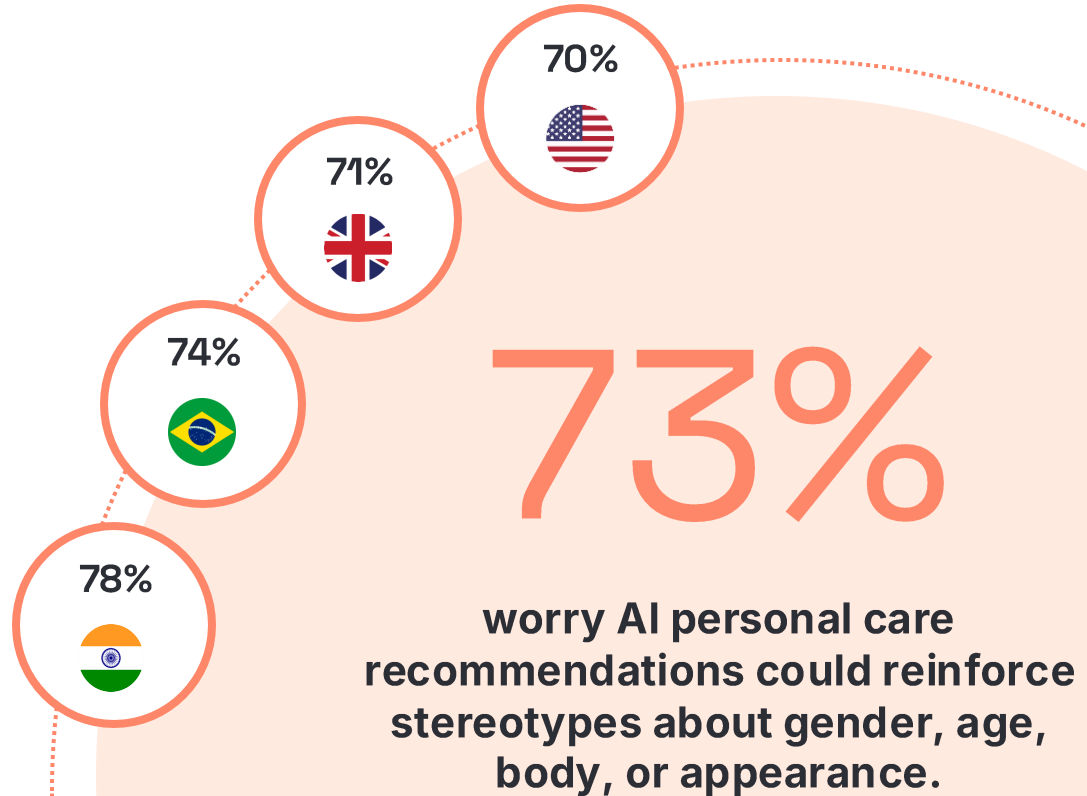
Source: Harris Poll Thought Leadership, The Algorithmic Aisle, June 2026

AI AS THE PERSONAL CARE NAVIGATOR

Personal care AI must avoid reinforcing stereotypes

Personal care products are often tied to identity. If AI recommendations rely on demographic assumptions or narrow training data, they can reinforce outdated ideas about who needs what, and consumers are alert to that risk.

Source: Harris Poll Thought Leadership, *The Algorithmic Aisle*, June 2026



AI AS THE PERSONAL CARE NAVIGATOR

Personal care loyalty is vulnerable, but trust still anchors the decision

Personal care shoppers are willing to let AI challenge habit when it identifies a better-fit product. But because these categories touch the body, consumers still want the reassurance of brands they already know and trust.

The opportunity is not just to recommend alternatives, but to make switching feel safer.

70%

would switch personal care brands if AI found one better suited to their needs



73%

would rather AI recommend trusted brands than unknown alternatives.



AI AS THE PERSONAL CARE NAVIGATOR

AI earns permission when it cuts through claims and ingredients

Consumers are not looking for AI to make personal care feel futuristic. They want it to **make the aisle easier to understand.**

The highest-value use cases are about reducing uncertainty, simplifying comparison, and helping people avoid products that do not fit their needs.

Source: Harris Poll Thought Leadership, The Algorithmic Aisle, June 2026

72% say AI would be useful for choosing hair care based on hair type or concerns.

72% say AI would be useful for finding products for sensitive skin.

74% say AI would be useful for comparing oral care products.

75% say AI would be useful for avoiding ingredients they do not want.

75% say AI would be useful for understanding ingredients or product claims.



India leads all other countries on several use cases, including finding products for sensitive skin and understanding ingredients / product claims.

The U.K. is consistently lower across tasks, reinforcing the need for a more cautious, proof-led approach.

The personal care mandate:

Permission before personalization

Source: Harris Poll Thought Leadership, The Algorithmic Aisle, June 2026

01.

Start where AI solves confusion

Use AI first to help consumers understand ingredients, claims, product differences, and fit. Create AI-ready product content: ingredient explanations, claim substantiation, use-case guidance, expert endorsements, reviews, and clear product comparisons.

02.

Build trust through control and expert credibility

Consumers want to see what data AI is using and want recommendations backed by credible professionals. Add dermatologist, dentist, pharmacist, or expert validation where relevant. Clearly state when guidance is not medical advice.

03.

Treat personal care data as intimate data

Use explicit opt-in for sensitive recommendations. Avoid surprising consumers with inferred needs. Never imply that AI has diagnosed or detected something personal without permission.

04.

Design for fit, not demographic assumptions

Consumers are wary of stereotypes around gender, age, body, and appearance. Let consumers self-identify their needs, routines, preferences, and goals. Test tools across diverse users and make that inclusivity is visible.

05.

Use AI to defend and disrupt loyalty

AI can encourage switching when it identifies a better-fit product, but consumers still prefer trusted brands. Incumbents should use AI to reinforce trust and fit. Challenger brands should use AI to prove relevance, explain differentiation, & reduce trial risk.

06.

Localize the AI model by market

India and Brazil are ready for more AI recommendation and discovery. The U.K. needs a more cautious, transparent, opt-in approach. The U.S. requires a practical utility-led proposition with strong control cues.

SECTION 4

AI as the Household Care Curator

AI AS THE HOUSEHOLD CARE CURATOR

Household care is built for the algorithm

Household care is one of the clearest AI permission spaces because the category is functional, routine, repeatable, and performance-driven. Consumers are more comfortable with AI recommendations here because the stakes feel less personal than beauty, personal care, food, or OTC health. But the category also creates a new loyalty risk: AI can make it easier to compare, substitute, and switch.



India (86%) and **Brazil (80%)** sit well above the global average, while the **U.K. (58%)** is the most skeptical – a gap that reflects fundamentally different relationships with AI, not just varying degrees of enthusiasm.



The path to household automation runs through approval, not autopilot

There is a clear, consistent line in where consumers give AI permission: it can inform, remind, compare, and discover — but the moment it acts on its own, comfort drops sharply.



India (79%) vs. UK (38%) on auto-reordering — a 41-point gap. India is a natural testbed for agentic features. Western markets need a trust-building on-ramp built on incremental approvals, not assumed autonomy.



accenture

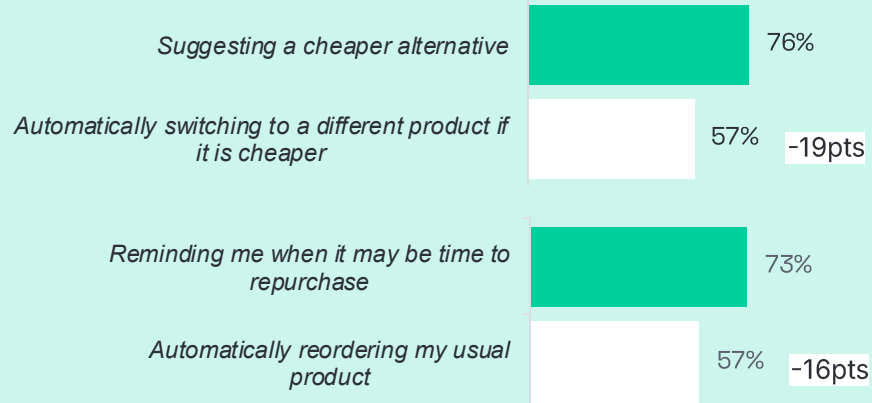
BUSINESS / RETAIL
AI Agents Influencing Not Just What Consumers Buy, but How They Think, Feel and Engage: Accenture Survey

Accenture surveyed more than 25,000 consumers in 16 countries.

Adobe for Business

The AI shopping gap: Why 86% of consumers use AI but still can't get what they need.

Comfort with AI-assisted shopping tasks



AI AS THE HOUSEHOLD CARE CURATOR

Household AI can drive discovery as long as it does not switch without asking

Consumer ambivalence about AI autonomy is universal — but so is their openness to discovery. AI isn't just a retention tool for incumbents; for brands consumers have never tried, it opens an entirely new channel for discovery.



India stands out: 87% are open to AI recommending new brands, 27 points above the U.K. (60%). In the U.K., even discovery faces headwinds — trust in AI remains the barrier.

71%

Are **open to AI recommending** a brand they've never tried before...

...but

79%

Would **not want AI to automatically switch** their household products without asking first

AI AS THE HOUSEHOLD CARE CURATOR

AI accelerates switching by putting proof front and center

AI exposes efficacy, ratings, and price at the moment of purchase. Legacy brands risk losing loyalty while challengers gain more visibility.



Brazil (81%) and India (84%) say AI could make them switch to a cheaper household brand. These markets are the highest-opportunity for any challenger brand on the algorithmic shelf.

73%

Would trust AI recommendations more if they included performance tests or proof

71%

Say AI could make them switch for a cheaper option

81%

Care more that a product works than which brand it is

The household care mandate:

Proof before autopilot

01.

AI suggests. The consumer decides

AI can inform and remind, but consumers don't want it acting without their approval. Build confirmation steps and oversight into the experience to earn trust.

02.

Make proof your competitive advantage

Familiarity no longer wins by default. Make performance data — certifications, efficacy claims, test results — AI-accessible to win the digital shelf.

03.

Close the trust gap for personal and sensitive products

Trust drops when the stakes feel personal. Surface certifications, ingredient data, and 3rd party endorsements within the AI layer to close the gap.

04.

Treat AI as a discovery engine

71% are open to AI recommending a brand they've never tried. For challengers and new entrants, the algorithmic shelf creates access the physical shelf never did.

05.

Defend with loyalty performance, not just familiarity

81% care more that a product works than which brand it is. Lead with performance and proof – not just familiarity.

06.

Localize the AI model by market

India and Brazil are ready for active AI features. The UK requires transparency and opt-in design.

CONCLUSION

The Takeaways

CONCLUSION

Winning the algorithmic aisle

AI will not replace the shopper, but it will reshape which brands are seen, trusted, compared, and switched into consideration.

To win, CPG brands must build for a world where recommendations are:

01.

Visible: Brands must show up inside AI-shortlisted environments.

02.

Explainable: Claims, benefits, and tradeoffs must be easy to understand.

03.

Provable: Reviews, certifications, expert support, and performance evidence must be easy to surface.

04.

Transparent: Paid influence and sponsorship must be impossible to miss.

05.

Localized: Recommendations must reflect real-world price, availability, culture, and context.

06.

Permission Led: Sensitive categories require consumer control, consent, and clear boundaries.



**AI may shape the shortlist, but
trust will still decide the sale.**



Thank you.



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