

The New Shelf Space

How AI Agents Are Rewiring CPG Brand Discovery

Summary



The Paradigm Shift

AI has bypassed the novelty phase. Traffic from GenAI to merchant sites is up **4,700% YoY**. It now dominates the middle-of-funnel consumer journey.

+4700% yoy Traffic growth



Demographic Reality

While human sources remain preferred overall, AI search is rapidly outpacing Influencer and Word-of-Mouth influence among Gen Z and Millennial consumers.

Gen Z/ Millennial shift



The Divide

Adoption is uneven. Males and high-earners use AI as a frictionless Fast Track tool (+28% Net Sentiment), while females require a Validation Loop before conversion

+28% net sentiment (male)

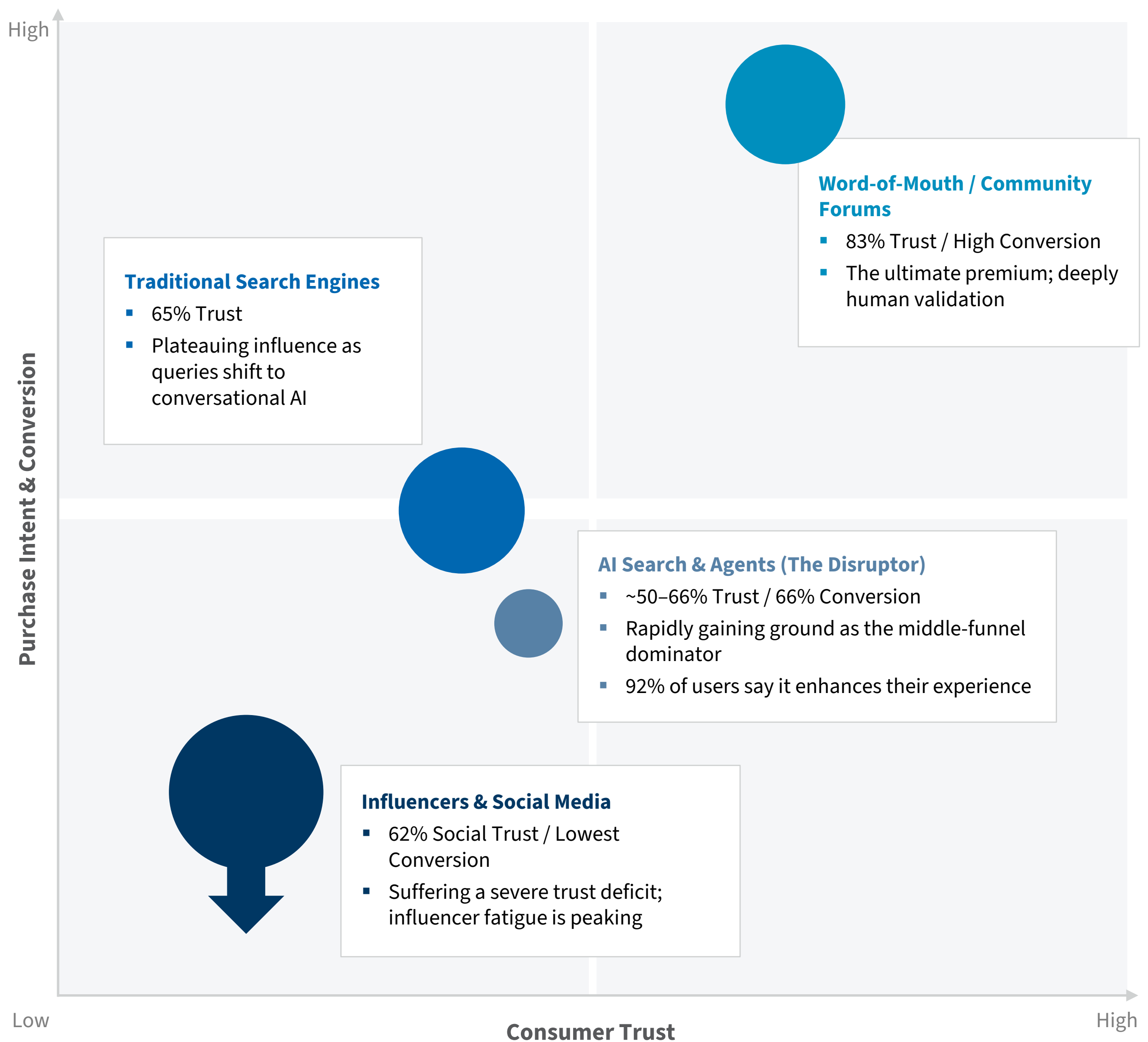


Category Vulnerability

High-frequency (Grocery) and high-complexity (Beauty, Electronics) categories are leading indicators for AI agentic commerce; low-frequency/high-risk items lag

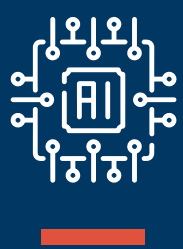
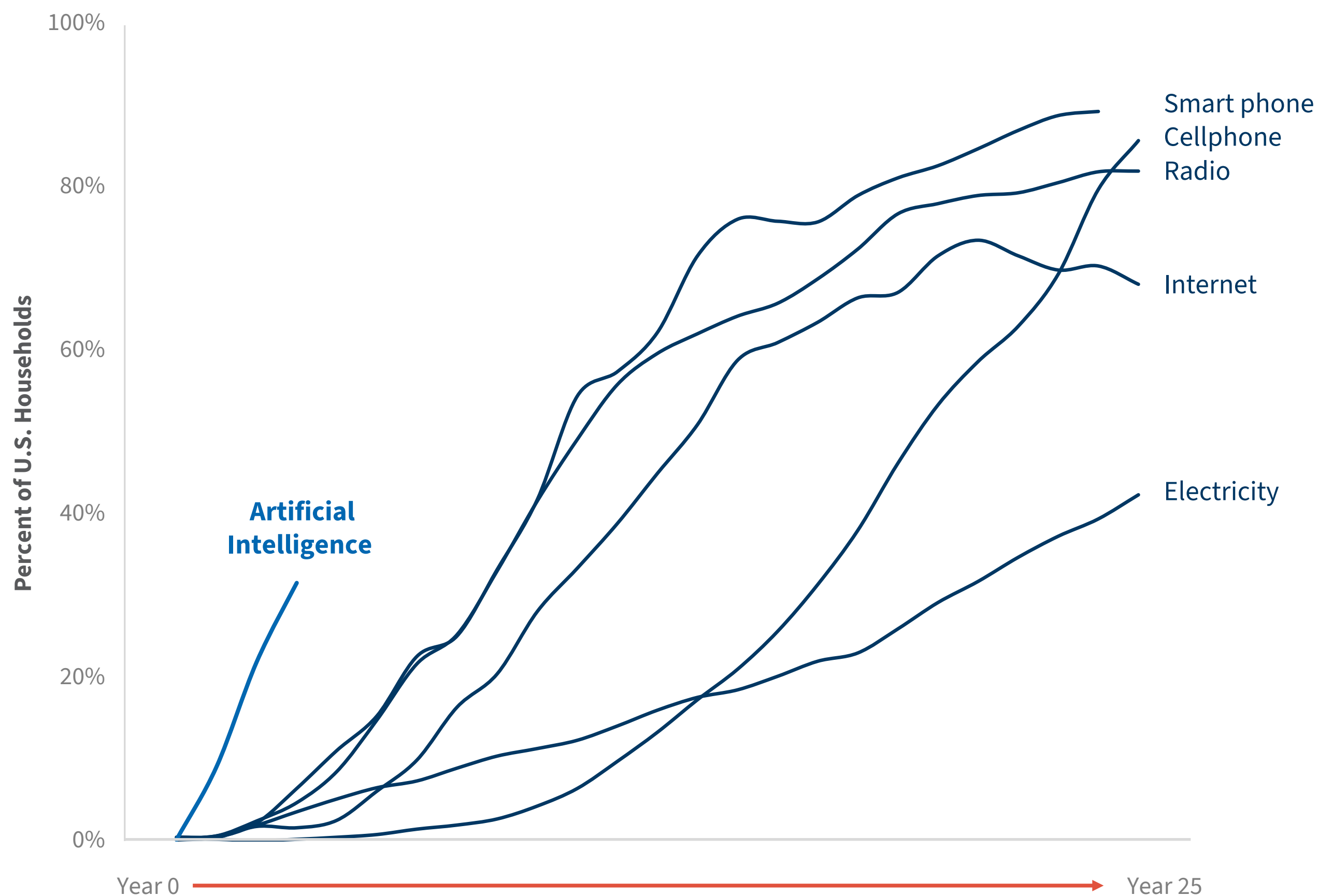
High frequency categories lead

AI Search and Agents are getting more established around consumer trust, disrupting the status quo



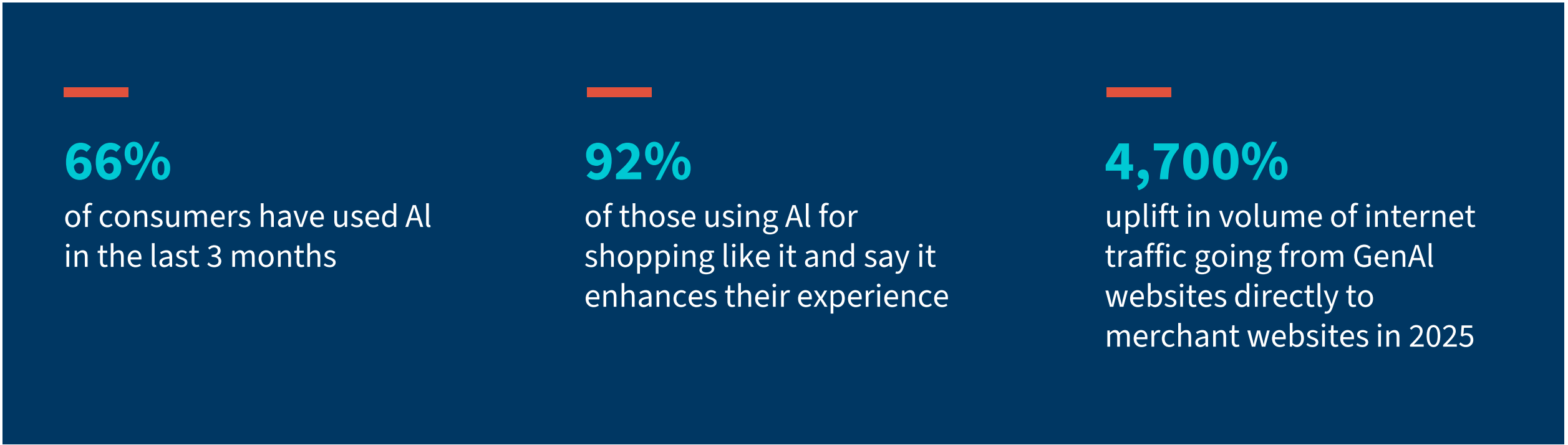
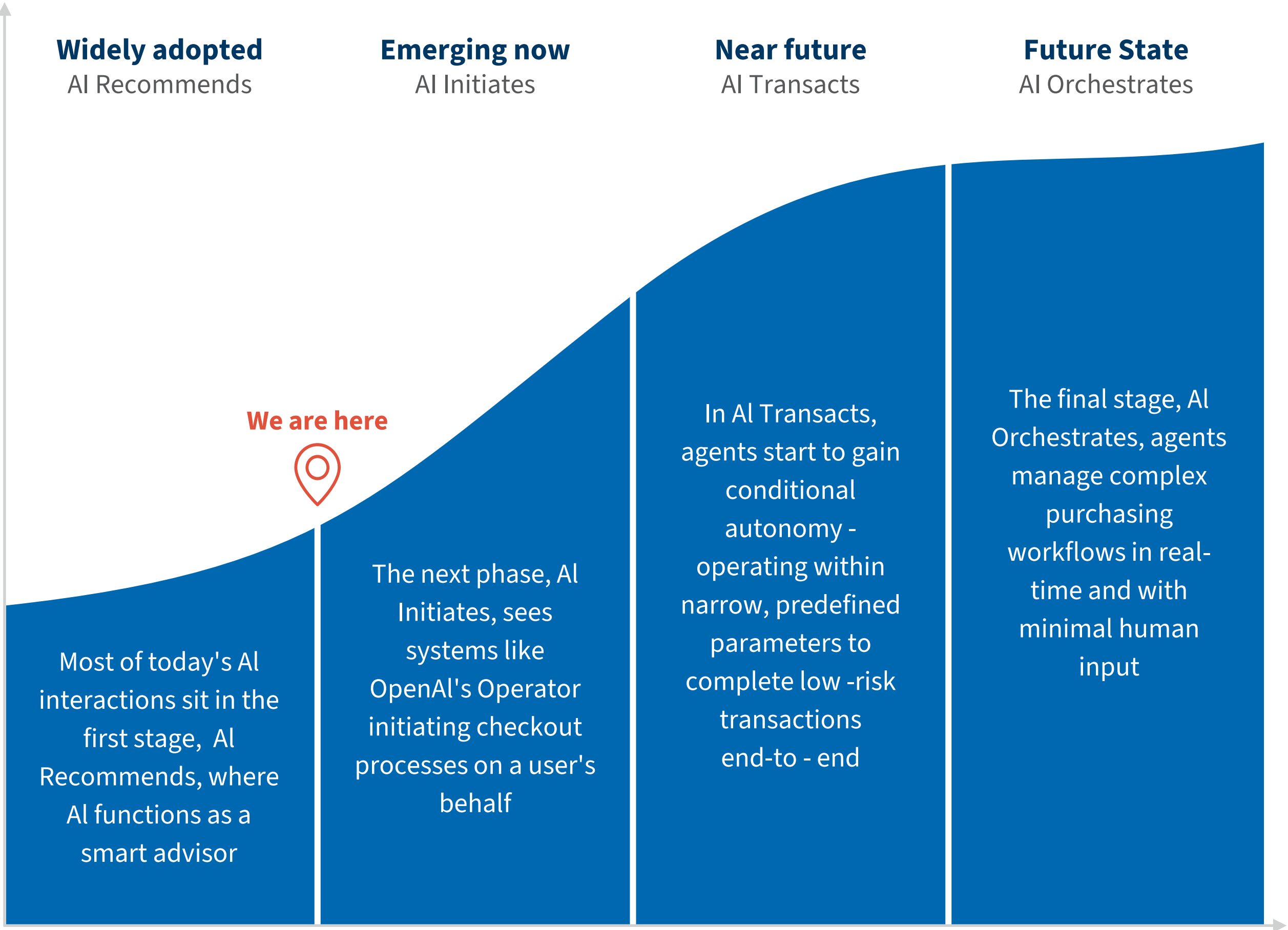
Sources: FTI Consumer Survey Data 2026; Note: Respondents could select multiple influences

AI has seen some of the fastest diffusion in human history



Artificial intelligence has emerged as the newest general-purpose technology of our era. Its adoption—surpassing a billion users in under three years—illustrates a speed of diffusion that few earlier technologies, such as the radio, Internet or smartphone, have matched

Agentic commerce is being widely adopted



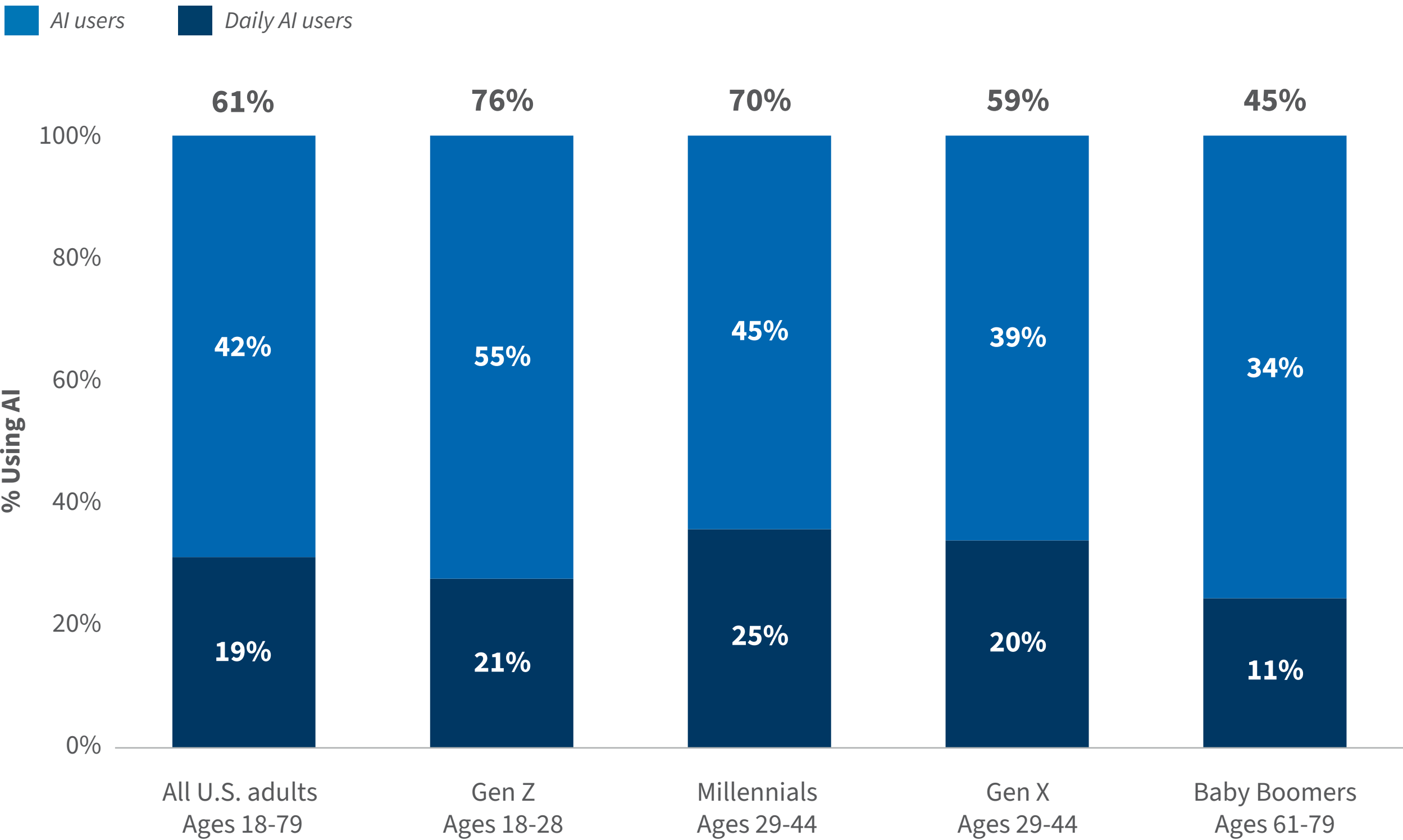
Sources: Stanford HAI, Adobe, Visa, Mastercard, FTI Consulting analysis

Surveys indicate that usage now spans every generation and AI has truly gone mainstream



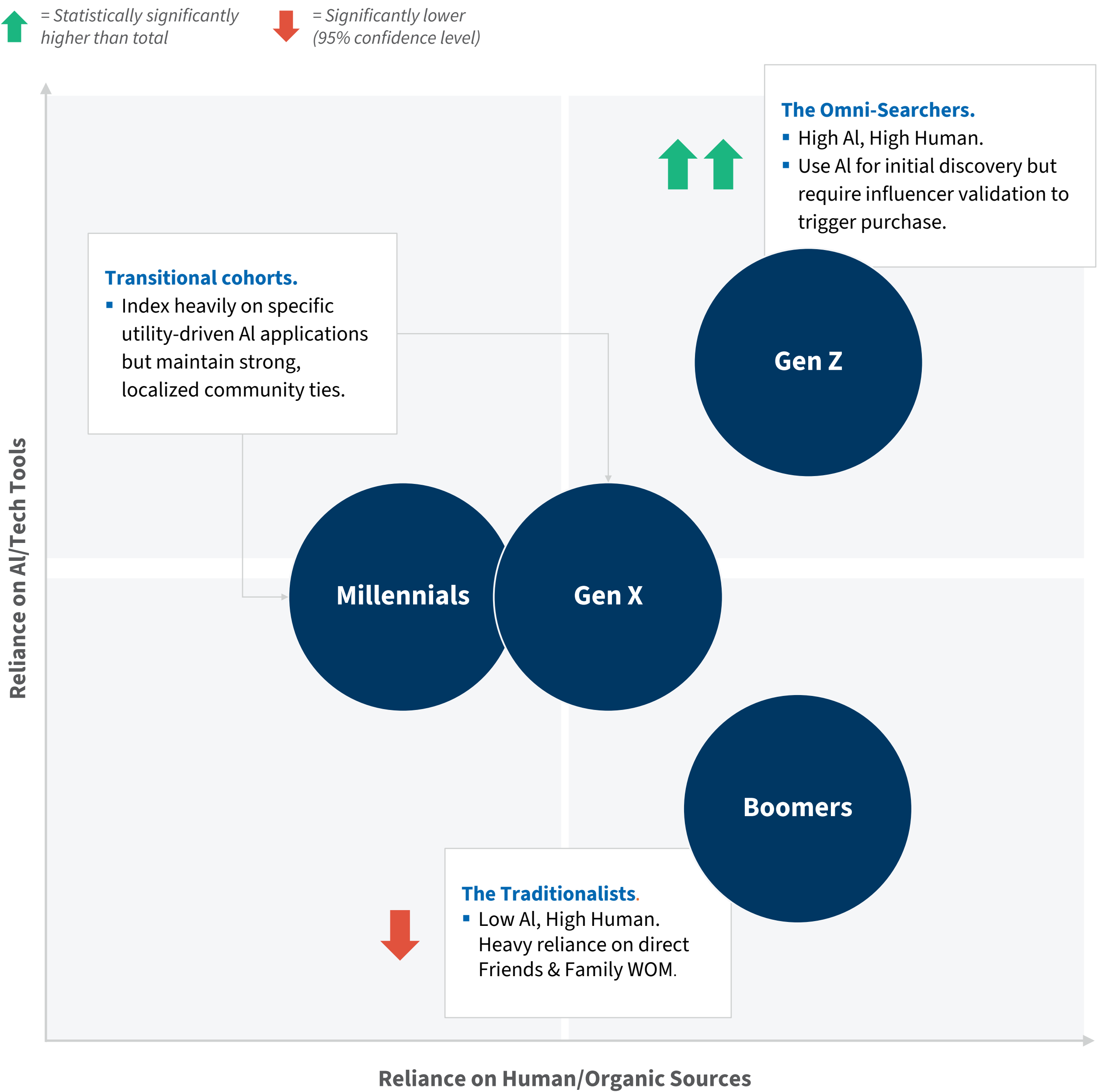
Who’s using AI?

Across generations. AI adoption is broad 19% of those aged 18-79 have made it a daily habit



Sources: Menlo Ventures, FTI Consulting analysis

FTI Consulting’s survey shows a clear difference in how Generations Navigate the Spectrum



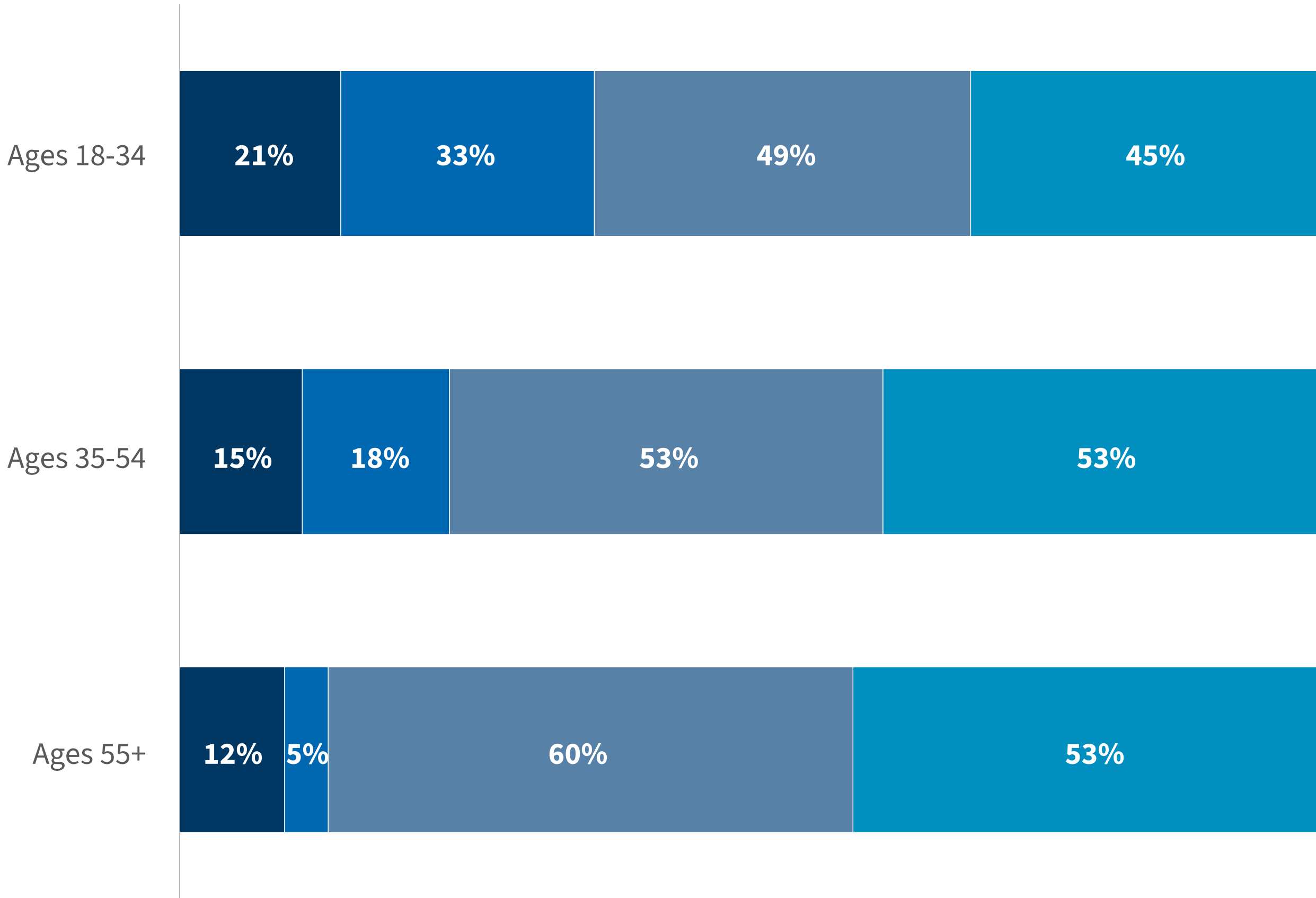
Sources: FTI Consulting analysis based on consumer survey n=967

Prime Purchasing Ages Rapidly Digitize Discovery



The **18-34** demographic utilizes AI (**21%**) significantly more than the **55+** cohort (**12%**), treating LLMs as primary research assistants for pre-purchase evaluation.

AI Search Influencers Friends & Family Word of Mouth



Sources: FTI Consumer Survey Data 2026; Note: Respondents could select multiple influences.

The Mechanics of Brand Influence

Based on FTI Consulting Survey: What typically influences how you think about a brand?



Insight

The primary drivers of brand perception undergo a fundamental inversion at the millennial/Gen X dividing line.

Sources: FTI Consumer Survey Data 2026; Note: Respondents could select multiple influences.

The Gender Skew



Human sources (Friends/Family/WOM) still heavily dominate female brand discovery, while male respondents show a much higher propensity to integrate AI tools directly into their baseline research.

Sources: FTI Consumer Survey Data 2026; Note: Respondents could select multiple influences.

Two clear Archetypes emerge in AI Perception & Shopping Behavior

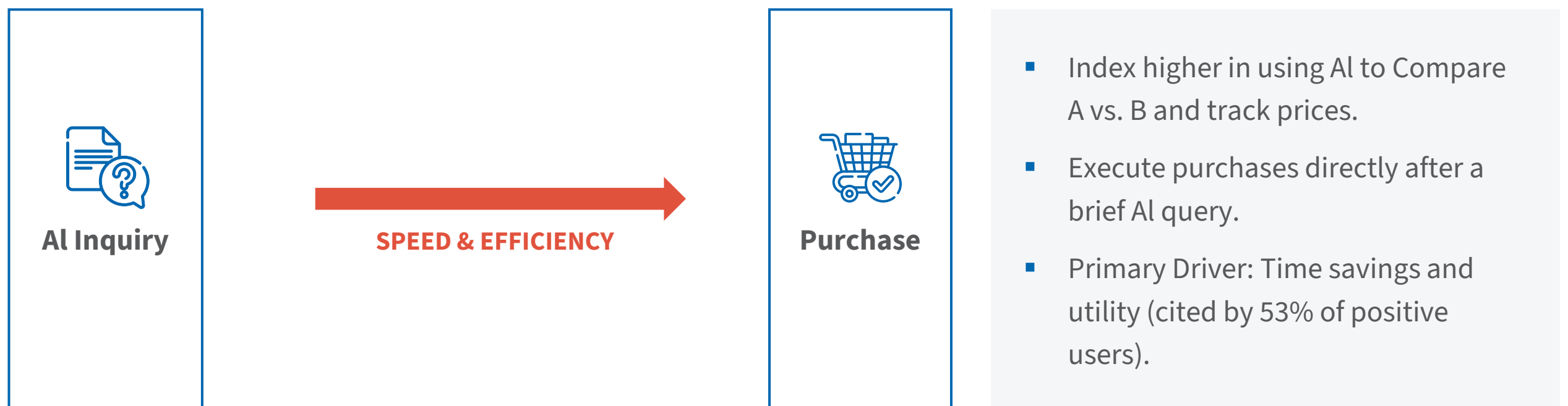
Fast track archetypes leverage AI for frictionless comparison; Validation archetypes requires human-in-the-loop review.



The Perception Gap

Male respondents hold a highly positive NET sentiment toward AI (+28%), while Female respondents appear to be largely neutral / skeptical (+6% NET).

The Fast Track Archetype



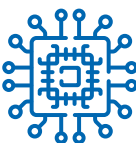
The Validation Archetype



Which CPG & Retail Categories are Moving to Agentic AI?



Consumers currently leverage AI to reduce the research load on complex decisions, but high-frequency household items are rapidly moving toward automated agentic replenishment.



Electronics & Tech

The #1 leading category for AI search. Highest conversion rates from GenAI traffic.



Grocery / Food & Beverage

27% of AI users specifically search recipes and meal planning to drive cart building.



Beauty & Personal Care

Goal-based discovery. L'Oreal's 'Noli' AI agent yields an 85% increase in purchase confidence.



Apparel & Fashion

High search volume, though conversion takes slightly longer due to visual validation needs.



Healthcare & Prescriptions

Trust deficit. 44% of negative AI sentiment is driven by a perceived lack of safeguards.



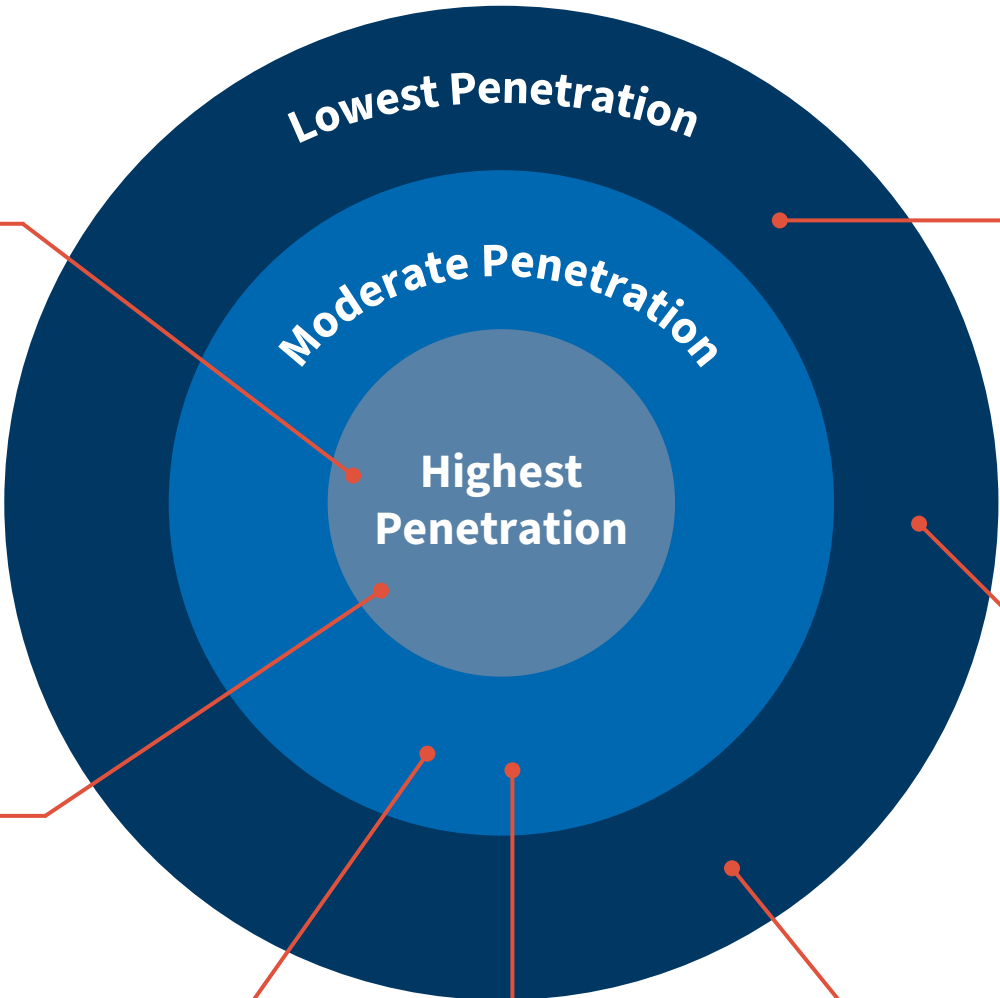
Home Furniture

High-consideration, physically complex items require spatial and tactile validation.



Financial Services

Security barriers. 70% of consumers worry about data privacy and fraud.



Strategic Synthesis

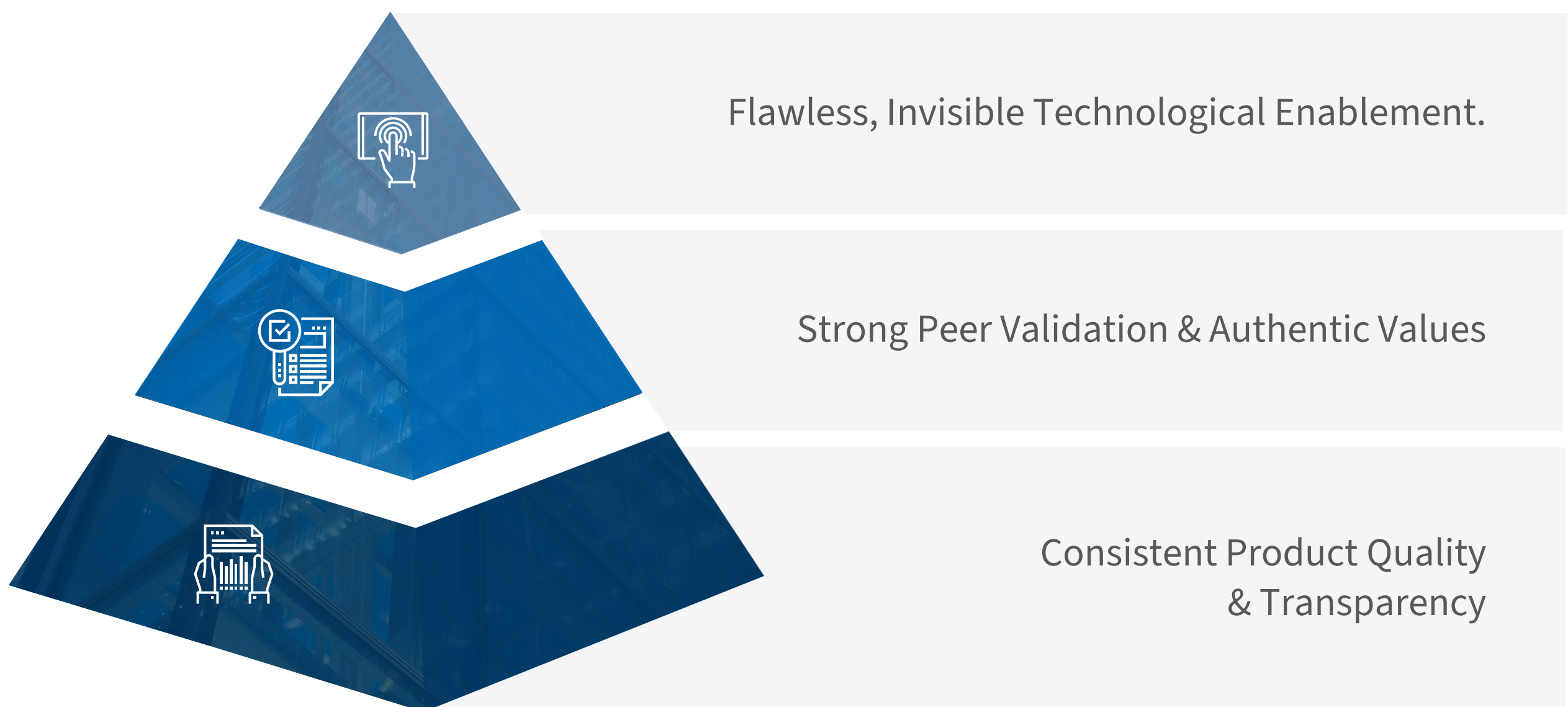
TRANSITIONING FROM TRADITIONAL SHARE OF VOICE TO LLM SHELF SHARE

	Audit AI Shelf Share	Adapt to the Archetypes	Prepare for Agentic Replenishment
 Insight	40-50% of consumers use AI for product research. Traditional SEO does not equal LLM visibility.	A one-size-fits-all AI funnel will fail to convert efficiently.	Middle-of-funnel discovery is transitioning to autonomous checkout for household staples and high-frequency goods.
 Action	Map how major models (OpenAI, Gemini, Perplexity) summarize your product set vs. competitors. Ensure brand positioning, specs and reviews are readable by AI data-scrappers.	For specific CPGs, optimize metadata for Fast Track spec comparisons and price tracking. For CPGs skewed towards certain demographics, ensure AI outputs seamlessly link to human validation (verified reviews, community forums, creator content).	Build personalized pricing and promotion APIs that can negotiate directly with consumer AI shopping agents to protect margin and maintain volume share.

Sources: FTI Consumer Survey Data 2026. Note: Respondents could select multiple categories.

The Trust Multipliers (Building the Base)

Based on FTI Consulting Survey: What increases your trust in a brand?



The AI Integration

Seamless, AI-driven experiences actively increase brand trust when they remove consumer friction without feeling invasive or overtly synthetic.

The Trust Destroyers (Risk Mitigation)

Based on FTI Consulting Survey: What would most damage your trust in a brand?



Impact Note: In the CPG sector, a fracture in consumer trust translates directly to immediate purchase abandonment at the physical or digital shelf.

Methodology & Study Context

Study Title: 2026 FTI Consulting Retail Resiliency Survey		
 Methodology ▪ Gen-pop survey conducted online by FTI Consulting’s Artificial Intelligence and Strategic Communications teams in March 2026.	 Sample ▪ 967 U.S. adults (18+) ▪ Weighted to U.S. Census benchmarks across ▪ Age, — Gender, — Race/ethnicity, and — Income	 Statistical Rigor: ▪ Tested at the 95% confidence level. ▪ Margin of error ±3 percentage points. ▪ Blue↑ upward arrow indicates significantly higher than total; ▪ Red↓ downward arrow indicates significantly lower.

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