From hype to habit

How consumers are embracing AI.

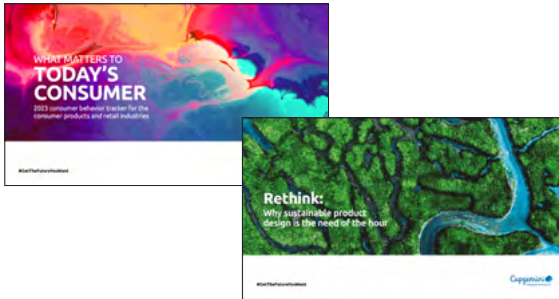Capgemini
RESEARCH INSTITUTE

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- In-depth global surveys
- 15-30 focus interviews of senior executives sharing best practices
- Detailed recommendations

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- Multi-perspective essays
- Infographics and visual summaries
- Trend overviews

01

Who should read this report and why?

Over the past two years, consumer attitudes toward AI have evolved considerably. This research examines the integration of AI into daily life; whether its use is aligned with consumer needs; and the extent to which it enhances consumer satisfaction. It also examines the **current adoption rate, usage patterns,** and **key challenges** faced by consumers, including trust, privacy, ethical concerns, and sustainability.

This report offers critical insights for business and technology leaders across B2C sectors to better align AI innovations with consumer expectations and to foster trust and add value in the post-digital age. This report will be particularly helpful to chief executive officers, chief marketing officers, chief information officers, and chief technology officers, operating in a B2C environment. It will be of great interest to anyone involved with AI and generative AI (Gen AI), innovation and analytics, consumer experience (CX), supply chain, and social commerce.

The report draws on the comprehensive analysis of the findings from a survey of 10,000 consumers from **18 to 80** years old, from a range of backgrounds and 13 countries across the Americas, Europe, and Asia-Pacific.

02

Executive summary

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Executive summary

AI is already an integral part of consumers' lives. Adoption is accelerating across all age groups, with Gen Z leading the way. But as AI becomes mainstream, consumer concerns about trust is rising.

AI is the new consumer companion

More than half of consumers view AI as a source of information and a collaborator. Consumers are moving from awareness of these tools to adoption. **One-third** of consumers now spend **more than an hour** on AI tools every day and interactions with AI tools (multiple times a day) have nearly **doubled from 2023**. Consumers view AI tools among the top three consumer subscriptions in terms of priority in their daily lives and nearly two in five consumers are willing to pay a premium price for AI tools that offer premium subscription-based services.

Gen Z is driving the AI revolution

Gen Z is driving the adoption surge **with 7 in 10 Gen Z actively exploring AI tools**. The majority of Gen Zs have an

overall positive view on AI tools as the drivers of innovation, while aged consumers are largely concerned about the misuse and **safety of these** tools. However, surprisingly older generations, especially baby boomers, are actively seeking emotional support via AI platforms.

AI is transforming how consumers shop

AI is transforming the shopping experience. Currently **more than half of consumers (50%)** have replaced traditional services or routines they previously used for shopping, travel or home management with AI-driven lifestyle apps and **have made a purchase based on Gen AI recommendations** (53%). Most (64%) consumers are open to purchasing new products or services recommended by Gen AI. This sentiment is particularly high among consumers living with family at 74%, and lowest among consumers living alone, at 53%. AI tools are fueling hyper-personalization among consumers: There is a shift towards agentic commerce with half the consumers stating they are comfortable using an AI shopping assistant across platforms in future.

Trust erosion: AI's key challenge

As AI becomes mainstream, the overall level of trust in AI tools has correspondingly declined compared to 2023. 58% of consumers trust content written by Gen AI compared to 72% two years ago. The percentage of consumers concerned about cyberattacks has doubled in the past two years (27% in 2023 to 53% in 2025), and over half (53%) of consumers are willing to pay a premium for AI tools that guarantee data safety and cybersecurity protection. Trust in AI-generated content is notably higher among Gen Z consumers. Older generations, such as millennials and boomers, express greater skepticism. As a result of which, consumers demand strict controls and guardrails: nearly 60% believe that **AI development should slow down**. 67% of consumers say AI developers should be legally responsible if their tools cause harm.

We recommend B2C companies build consumer trust in AI, prioritize data safety and cybersecurity, and reimagine data visibility and discoverability in the age of AI.
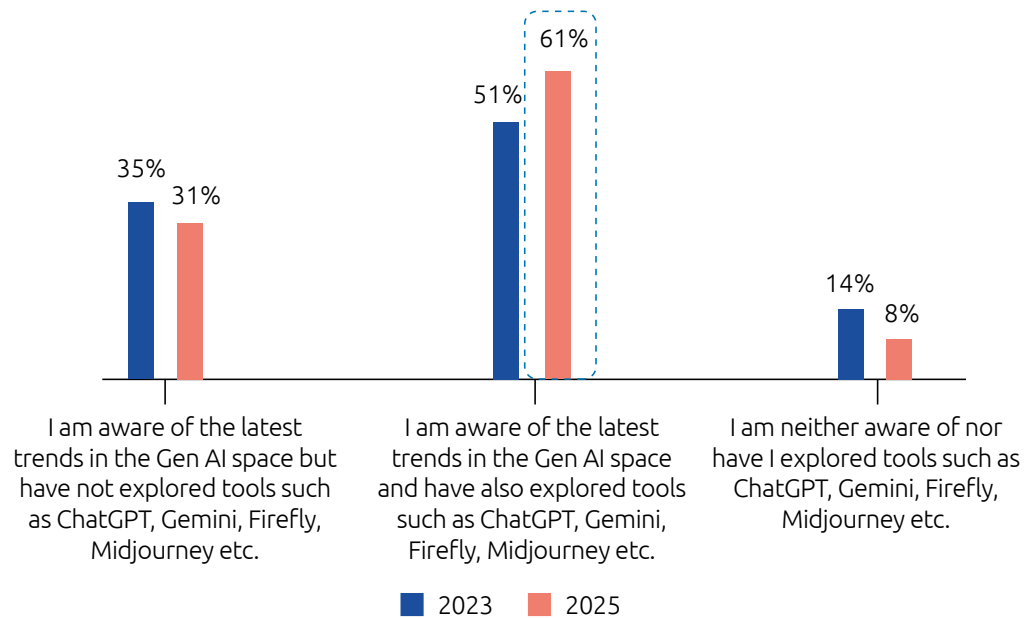
03

AI: The new consumer companion

Consumer adoption of AI is increasing

35% 2023, 31% 2025 — I am aware of the latest trends in the Gen AI space but have not explored tools such as ChatGPT, Gemini, Firefly, Midjourney etc.

51% 2023, 61% 2025 — I am aware of the latest trends in the Gen AI space and have also explored tools such as ChatGPT, Gemini, Firefly, Midjourney etc.

14% 2023, 8% 2025 — I am neither aware of nor have I explored tools such as ChatGPT, Gemini, Firefly, Midjourney etc.
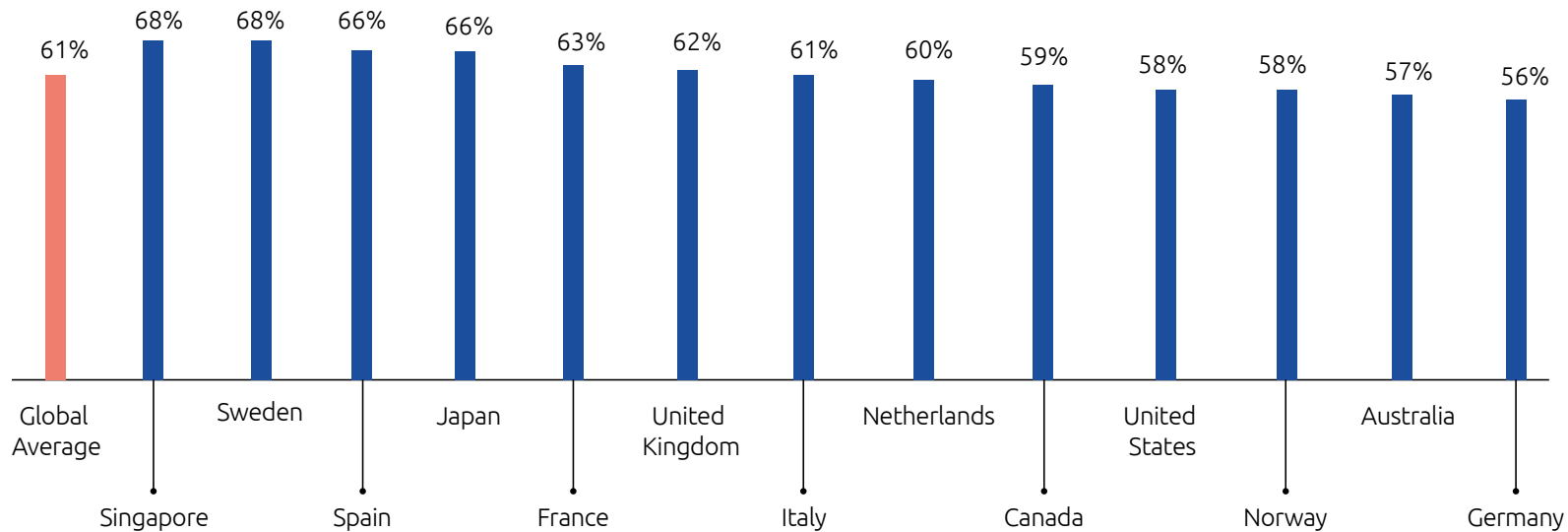
■ 2023 ■ 2025

Note: For 2025 'I am aware of the latest trends in AI space but have not explored tools' includes 19% of consumers who aware of the latest trends in AI space but have not explored tools and 12% of consumers who are aware of these trends but do not prefer using them.
Source: Capgemini Research Institute, AI and consumers survey, October 2025, N = 10,027 consumers; Capgemini Research Institute, "Why consumers love Gen AI," 2023, N=10,000 consumers.
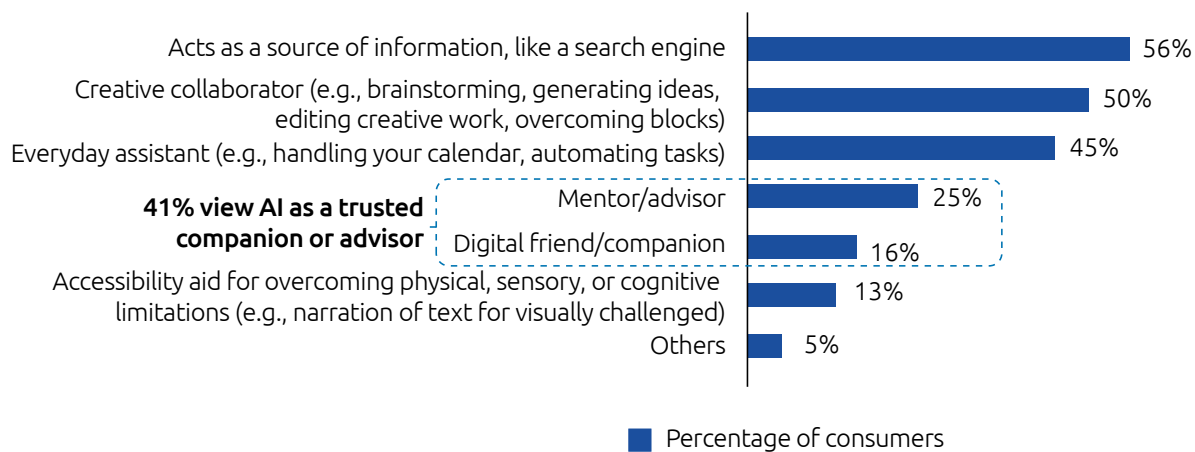
Consumer adoption of AI is high across countries

I am aware of the latest trends in the Gen AI space and have also explored tools such as ChatGPT, Gemini, Firefly, Midjourney etc.

Global Average	Singapore	Sweden	Spain	Japan	France	United Kingdom	Italy	Netherlands	Canada	United States	Norway	Australia	Germany
61%	68%	68%	66%	66%	63%	62%	61%	60%	59%	58%	58%	57%	56%

Source: Capgemini Research Institute, AI and consumers survey, October 2025, N = 10,027 consumers.

AI is the consumer's on-demand assistant and search engine

How would you describe the role AI tools fulfill in your daily lives?

Role	Percentage
Acts as a source of information, like a search engine	56%
Creative collaborator (e.g., brainstorming, generating ideas, editing creative work, overcoming blocks)	50%
Everyday assistant (e.g., handling your calendar, automating tasks)	45%
Mentor/advisor	25%
Digital friend/companion	16%
Accessibility aid for overcoming physical, sensory, or cognitive limitations (e.g., narration of text for visually challenged)	13%
Others	5%

41% view AI as a trusted companion or advisor [Mentor/advisor and Digital friend/companion grouped]

■ Percentage of consumers

Source: Capgemini Research Institute, AI and consumers survey, October 2025, N = 9,222 consumers who are aware and/or use AI.
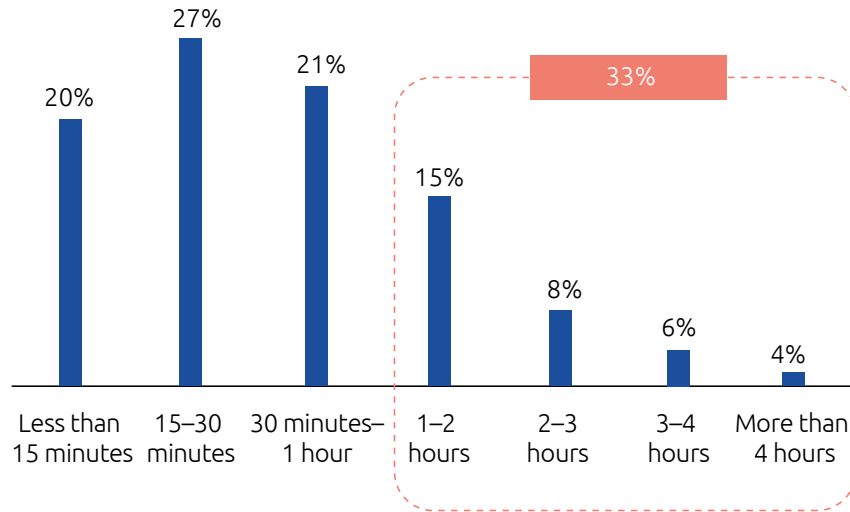
In October 2025, OpenAI launched **an AI-powered browser** that integrates ChatGPT. It offers intelligent features such as page-aware summaries, writing assistance, and an "agent mode" that can automate tasks such as filling in forms or gathering data.[1]

58% are comfortable letting AI choose their next binge watch and 41% are comfortable with letting AI choose dinner based on their mood.

20% of consumers who landed on Walmart.com by clicking a link on another site got there from ChatGPT.[2] As AI-based search evolves, generative engine optimization (GEO) is becoming as important as search engine optimization (SEO).

One-third of consumers now spend more than an hour on AI tools every day

Average daily consumer usage of AI

- Less than 15 minutes: 20%
- 15–30 minutes: 27%
- 30 minutes–1 hour: 21%
- 1–2 hours: 15%
- 2–3 hours: 8%
- 3–4 hours: 6%
- More than 4 hours: 4%

(1–2 hours through More than 4 hours grouped: 33%)

Source: Capgemini Research Institute, AI and consumers survey, October 2025, N = 6,116 consumers.

How frequently do you have AI-enabled interactions?
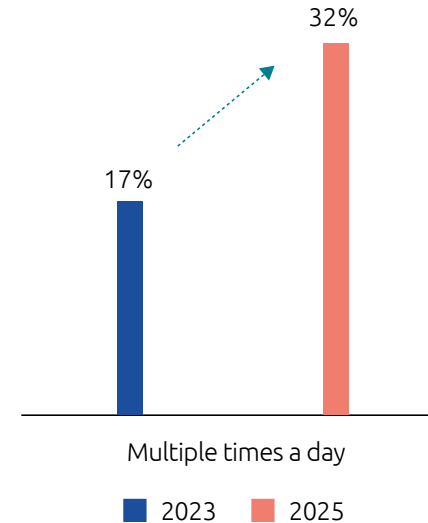
Multiple times a day
- 2023: 17%
- 2025: 32%

Legend: ■ 2023 ■ 2025

Source: Capgemini Research Institute, AI and consumers survey, October 2025, N = 6,116 consumers, Capgemini Research Institute, "Why consumers love Gen AI," 2023, N= 5, 092 consumers.
Note: By AI-enabled interactions we mean interactions where AI helps deliver personalized or automated responses, such as recommendations, customer support, or tailored content.

More than one in three consumers use AI tools for personal development

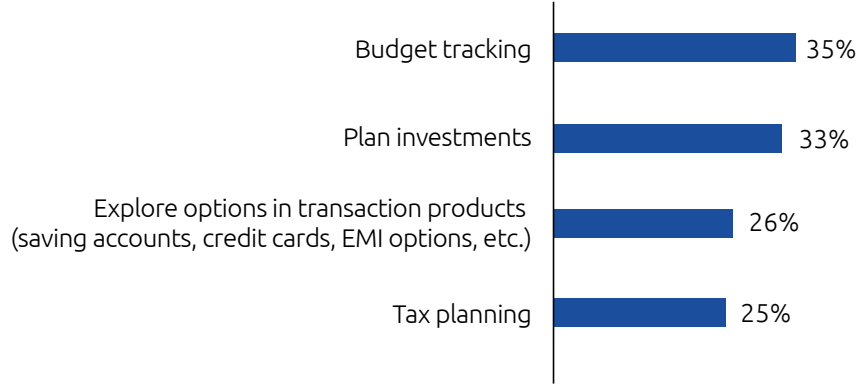**Please select the areas where you are currently using AI.**
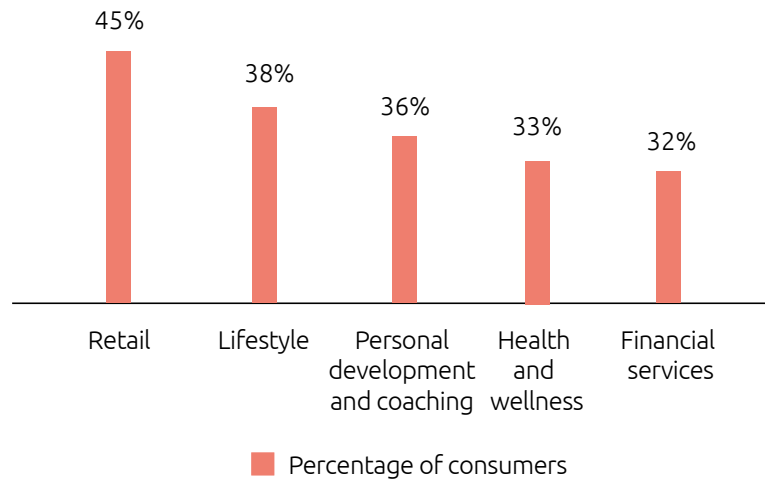
45% Retail
38% Lifestyle
36% Personal development and coaching
33% Health and wellness
32% Financial services

■ Percentage of consumers

Consumer usage extends to financial planning

One-third of consumers who use AI in finance use it for budget tracking and investment planning

Category	%
Budget tracking	35%
Plan investments	33%
Explore options in transaction products (saving accounts, credit cards, EMI options, etc.)	26%
Tax planning	25%

Source: Capgemini Research Institute, AI and consumers survey, October 2025. Note: N = 2,981 consumers, who selected "finance" in answer to the question "In which of the areas are you currently using AI?" out of 9,222 consumers who are aware and/or use AI.

One in two Gen Z have reduced interactions with financial/legal advisors

Since integrating AI tools for financial planning or legal assistance, I have decreased my usage of conventional advisors/ legal professionals
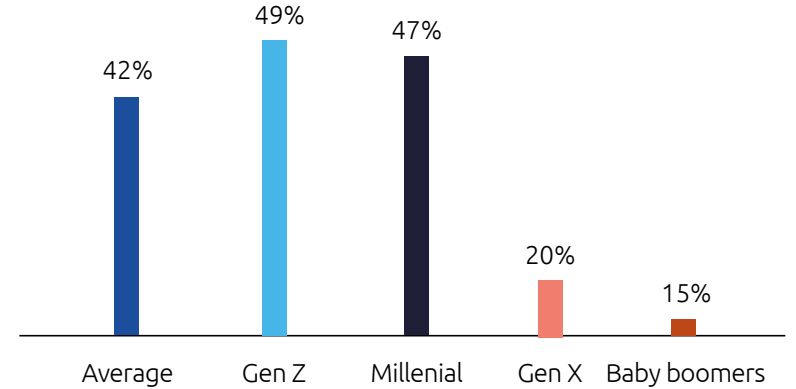
Average	Gen Z	Millenial	Gen X	Baby boomers
42%	49%	47%	20%	15%

Source: Capgemini Research Institute, AI and consumers survey, October 2025, N = 9,222 consumers who are aware and/or use AI.

Over 28 million adults now use AI tools to manage their money.[3]
In Q3 of 2025, **neobank SoFi** launched Cash Coach, an AI-powered customer insights engine that helps consumers optimize earned interest in deposit accounts and minimize interest expense on credit cards.[4]

> *AI is empowering millions to feel more confident about their financial decisions – but it's vital they receive information they can trust.*[5]
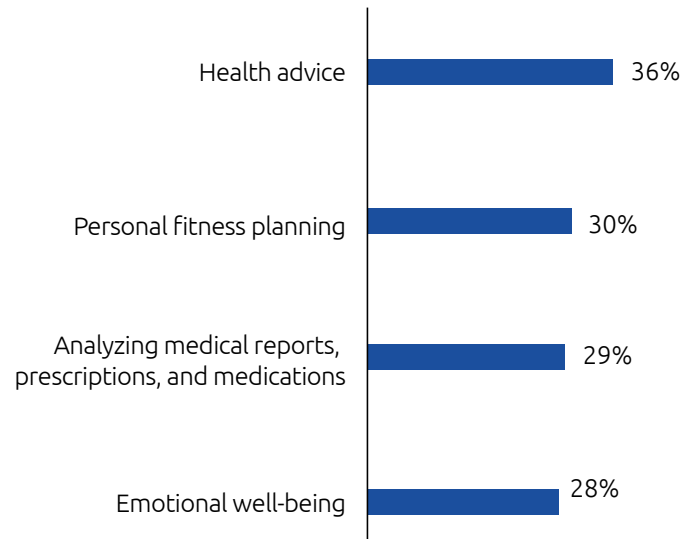
Jas Singh

CEO Consumer Relationships
Lloyds Banking Group

More than one in three consumers who use AI for health and wellness use it for health advice

Do you use AI tools for the following health and wellness activities?

Health advice — 36%

Personal fitness planning — 30%

Analyzing medical reports, prescriptions, and medications — 29%

Emotional well-being — 28%

The use of AI in healthcare is deepening engagement for less engaged spectrum of older generations

Baby boomers

51% of boomers use AI for health advice

43% of boomers use AI for analyzing medical reports, prescriptions, and medications

Gen X

50% of Gen X use AI for health advice

31% of Gen X use AI for analyzing medical reports, prescriptions, and medications

44% of consumers have reduced their use of traditional healthcare services (such as in-person consultations and personal trainers) since adopting AI-powered health and wellness recommendations or tools.
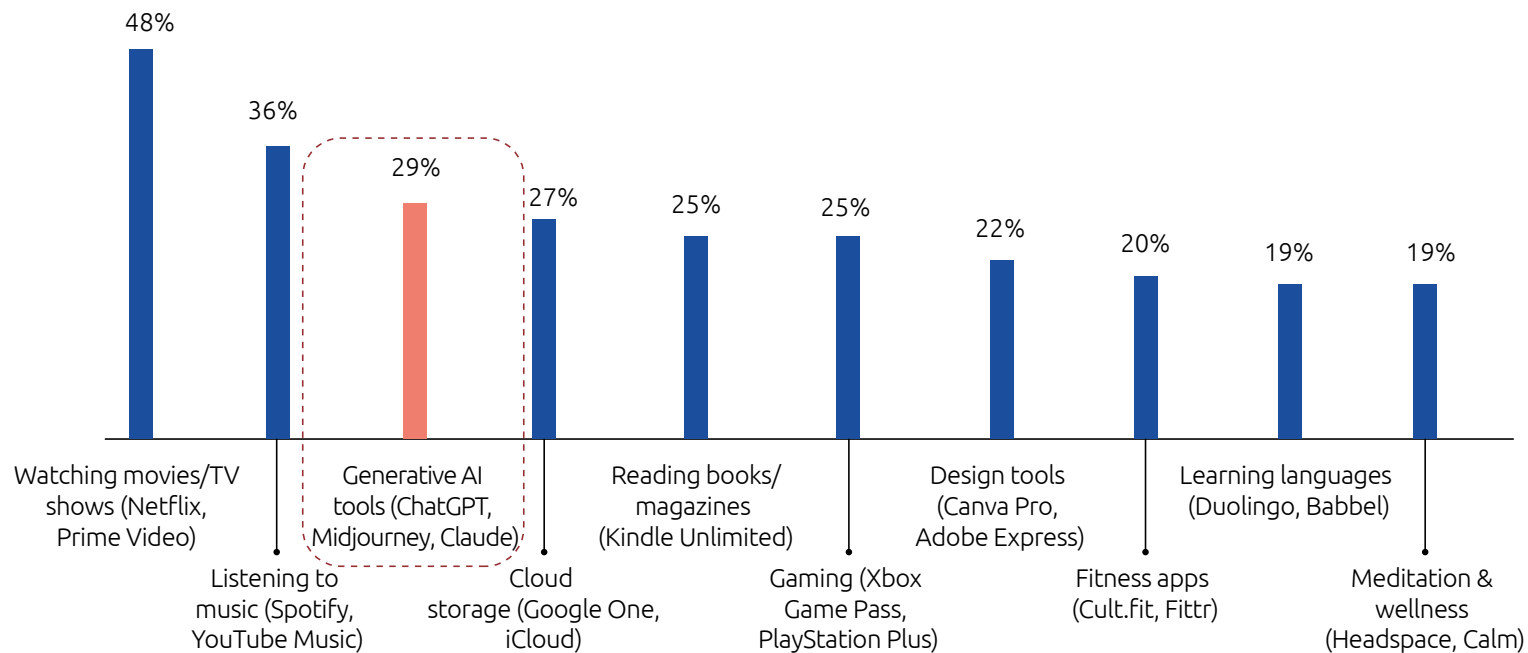
Source: Capgemini Research Institute, AI and consumers survey, October 2025, N = 9,222 consumers who are aware and/or use AI.

Source: Capgemini Research Institute, AI and consumers survey, October 2025, N = 3,023 consumers. Note: N = 3,023 consumers, who selected "Health and wellness" in response to the question "In which of the areas are you currently using AI?" out of 9,222 consumers who are aware and/or use AI.

AI tools are now in the top three consumer subscription categories

AI tools rank third, behind movie and music subscriptions

**Please rank the following services in order of importance in your daily life**

Service	Percentage
Watching movies/TV shows (Netflix, Prime Video)	48%
Listening to music (Spotify, YouTube Music)	36%
Generative AI tools (ChatGPT, Midjourney, Claude)	29%
Cloud storage (Google One, iCloud)	27%
Reading books/magazines (Kindle Unlimited)	25%
Gaming (Xbox Game Pass, PlayStation Plus)	25%
Design tools (Canva Pro, Adobe Express)	22%
Fitness apps (Cult.fit, Fittr)	20%
Learning languages (Duolingo, Babbel)	19%
Meditation & wellness (Headspace, Calm)	19%

Gen AI tools, which did not exist as a category three years ago, have secured a place in the top three of subscription-based services, surpassing subscription-based cloud storage services that have been around for many years. This surge suggests that AI is already deeply embedded in consumers' digital routines.

Source: Capgemini Research Institute, AI and consumers survey, October 2025, N = 9,222 consumers who are aware and/or use AI.
Note : The order of importance here falls under high priority category.

Nearly two in five consumers are willing to pay a premium for AI tools

Number of paid subscriptions to AI tools

19%
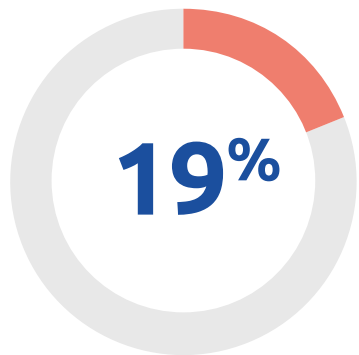
Currently **one in five** consumers has at least one paid subscription for AI tools

- 57% One paid subscription
- 30% 1–3 paid subscriptions
- 10% 4–6 paid subscriptions
- 3% More than 6 paid subscriptions
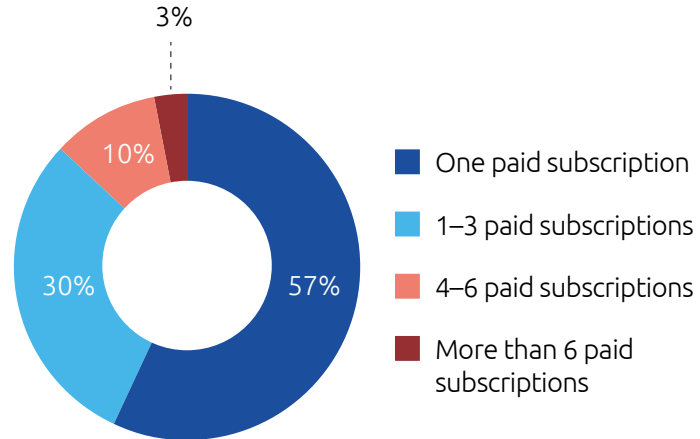
In September 2025, OpenAI hit one million paid business users. Businesses and professionals,[6] in particular, are increasingly willing to pay a premium for tools that offer deeper reasoning, enhanced productivity, and specialized features.

Source: Capgemini Research Institute, AI and consumers survey, October 2025, N = 6,116 consumers.

Source: Capgemini Research Institute, AI and consumers survey, October 2025, N = 1,182 consumers.

38% of consumers are willing to pay a premium price for AI tools that offer premium subscription-based services (e.g., Claude Pro).

44% of consumers are ready to pay a premium for traditional subscriptions that are now AI-powered.

Source: Capgemini Research Institute, AI and consumers survey, October 2025, N = 9,222 consumers who are aware and/or use AI.

> *"The rapid rise in AI adoption and expectations is evident. Gen Z is fully embracing AI, integrating it seamlessly into their browsing, research, and purchasing habits. Time-pressed families are leveraging AI for convenience and personalised planning. Despite initial caution, Gen X and Boomers are adopting AI for more complex engagements, such as health, finance, and lifestyle. This marks a significant shift in the consumer journey. It's time for AI to move from the back office to become an integral part of the consumer experience. Businesses must now optimize their touchpoints for AI assistants and ensure their products and services stay visible to consumers who are no longer using traditional search."*

Steve Hewett

Global Technology, Data & AI Leader,
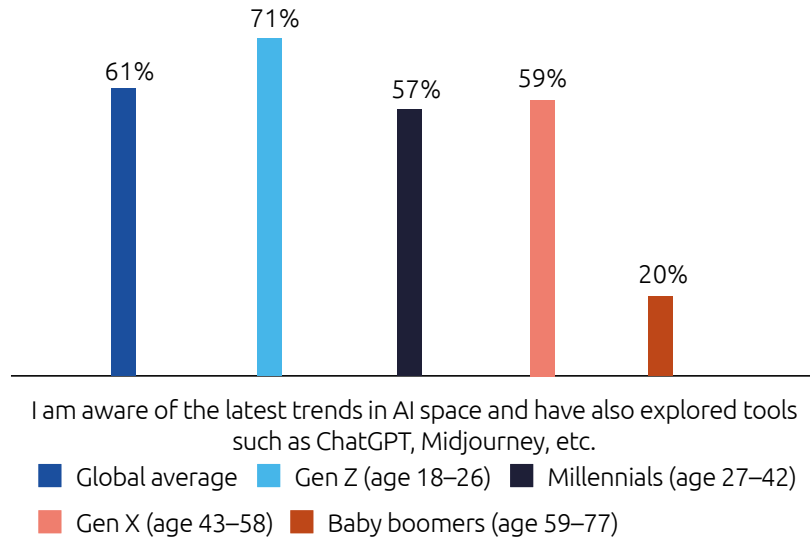frog, Capgemini Invent

04

Gen Z is driving the AI revolution

7 in 10 Gen Zs are actively exploring AI

**The new generation gap: Gen Z embraces AI while older generations remain skeptical**

Are you aware of the latest AI trends and have you explored the tools?

I am aware of the latest trends in AI space and have also explored tools such as ChatGPT, Midjourney, etc.

- ■ Global average
- ■ Gen Z (age 18–26)
- ■ Millennials (age 27–42)
- ■ Gen X (age 43–58)
- ■ Baby boomers (age 59–77)

Source: Capgemini Research Institute, AI and consumers survey, October 2025, N = 10,027 consumers; N= 6116 consumers who selected "I am aware of the latest trends in AI space and have also explored tools like ChatGPT, Midjourney, etc." ; Gen Z= 3044 out of 4310 consumers; Millennials = 1948 out of 3409 consumers; Gen X= 1004 out of 1708 consumers; Baby boomers =120 out of 600 consumers.

Gen Zs are open to exploring new features and are more optimistic about AI tools. As much as **69%** of Gen Zs say they would enjoy using a chatbot with features such as ChatGPT.

Percentage of consumers who believe AI helps make life easier, solves problems, and drives innovation.
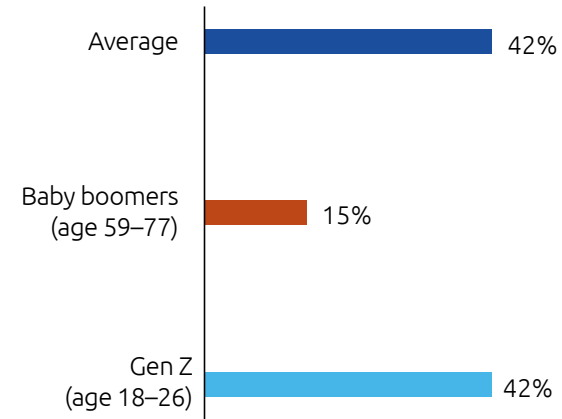
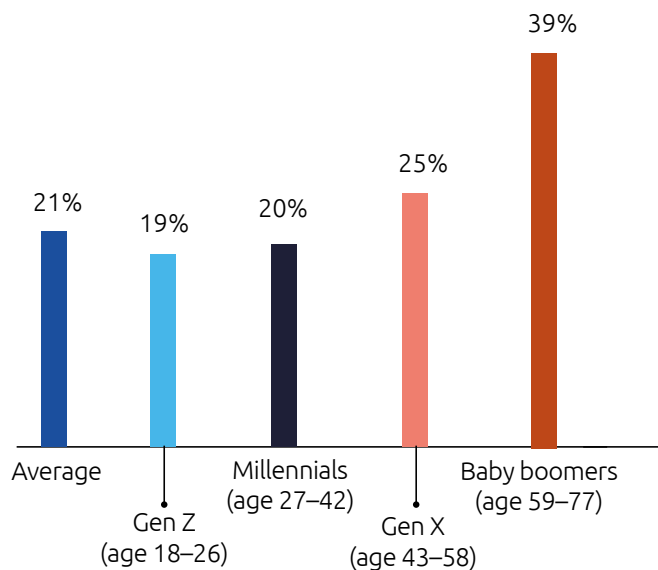AI helps make life easier, solves problems, and drives innovation.

Source: Capgemini Research Institute, AI and consumers survey, October 2025, N = 9,222 consumers who are aware and/or use AI.

Most Gen Zs have an overall positive view of AI tools as the drivers of innovation.

# Older generations actively seek emotional support from AI

Two in five baby boomers are turning to AI for emotional support

I feel comfortable turning to AI for emotional support

- Average: 21%
- Gen Z (age 18–26): 19%
- Millennials (age 27–42): 20%
- Gen X (age 43–58): 25%
- Baby boomers (age 59–77): 39%

I find myself turning to AI tools for support, company, or to discuss personal topics, as I would with people in my life.

- Average: 30%
- Gen Z (age 18–26): 30%
- Millennials (age 27–42): 29%
- Gen X (age 43–58): 30%
- Baby boomers (age 59–77): 40%

40% of **baby boomers** have used a Gen AI tool to have conversations like those they might have with friends, family, or partners.

Source: Capgemini Research Institute, AI and consumers survey, October 2025, N = 9,222 consumers who are aware and/or use AI; N = 1958 consumers who feel comfortable turning to AI for emotional support during a personal crisis; Gen Z = 819 out of 4246 consumers; Millennials 627 out of 3097 consumers; Gen X = 402 out of 1595 consumers; Baby Boomers = 110 out of 284 consumers.
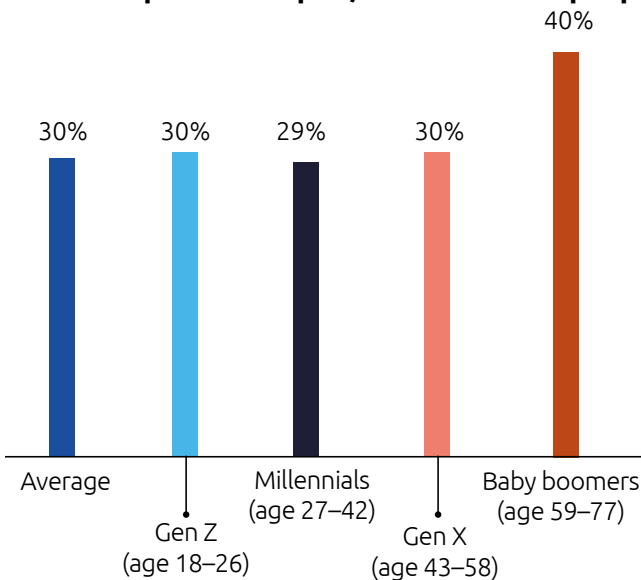
Source: Capgemini Research Institute, AI and consumers survey, October 2025, N = 9,222 consumers who are aware and/or use AI; N = 2768 consumers answered the question "I find myself turning to AI tools for support, company, or to discuss personal topics, as I would with people in my life"; Gen Z = 1269 out of 4246 consumers; Millennials 904 out of 3097 consumers; Gen X = 480 out of 1595 consumers; Baby Boomers = 115 out of 284 consumers.

05

AI is transforming the shopping experience

AI is reinventing the shopping experience

Shoppers are increasingly open to using AI

50%

of consumers have replaced traditional services with AI-driven lifestyle apps[7] or assistants (e.g., for travel, shopping, or home management).

71%

of consumers want Gen AI integrated into their shopping interactions.[8]

68%

are interested in tools that aggregate search results across online search engines, social media, and retailers' websites.[9]

Amazon's Rufus, a Gen AI shopping assistant, is rapidly transforming e-commerce by handling millions of conversational queries daily. During the Prime Day promotional period, it scaled up to three million tokens per minute, highlighting the capacity for rapid deployment of AI-driven shopping.[10]

OpenAI introduced Operator, an AI-powered shopping agent for consumers in the UK. Operator uses a conversational text-based interface that can understand and respond to specific user queries, providing recommendations, and even acting as a personal shopper.[11]

Walmart launched Sparky, a generative AI-powered shopping assistant integrated into its mobile app to help customers find products, summarize reviews, and receive personalized recommendations.[12] Sparky is designed to evolve into an autonomous agent that can handle complex shopping tasks.

Note: By AI/ AI tools we mean traditional AI tools or generative AI or agentic AI.

Consumers staying with families show higher adoption of AI-powered retail shopping than individuals living alone

64% of consumers are open to purchasing new products or services recommended by AI. This sentiment is particularly strong among consumers including Gen Z living with family, relatives, or guardians **(74%)**, and lowest among consumers living alone **(53%)**.
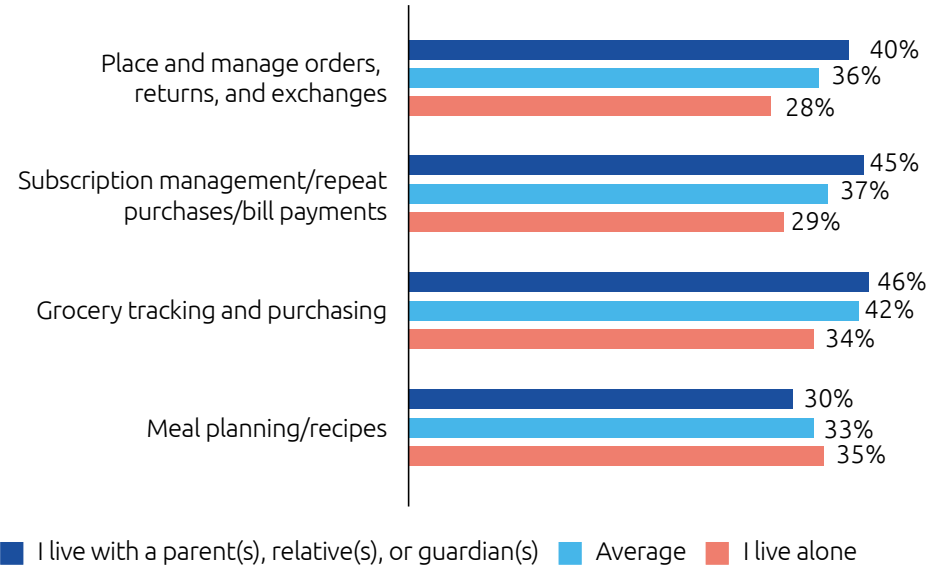
Similarly, **more than half (51%)** of consumers living with families have replaced traditional services with AI tools (such as ChatGPT) as their go-to tools for product/service recommendations. Only **38%** of people living alone have done so.

Source: Capgemini Research Institute, AI and consumers survey, October 2025, N = 9,222 consumers who are aware and/or use AI.
Note: By AI/ AI tools we mean traditional AI tools or generative AI or agentic AI.

Do you use AI tools for the following activities?

Place and manage orders, returns, and exchanges
- 40%
- 36%
- 28%

Subscription management/repeat purchases/bill payments
- 45%
- 37%
- 29%

Grocery tracking and purchasing
- 46%
- 42%
- 34%

Meal planning/recipes
- 30%
- 33%
- 35%

■ I live with a parent(s), relative(s), or guardian(s) ■ Average ■ I live alone

Source: Capgemini Research Institute, AI and consumers survey, October 2025, N = 4,177 consumers.

Household dynamics including time scarcity and consumers ordering for entire family play a key role in shaping consumer engagement with AI-driven shopping.

AI-generated recommendations drive retail sales

42%

of Gen Z trust recommendations from AI tools compared to 34% of all consumers.

53%

have made a purchase based on AI recommendations.

48%

say AI supports better purchasing decisions.

75%

are open to Gen AI shopping recommendations.[13]

Slazenger, a sportswear brand, used personalized omnichannel messaging and AI-powered automation across email, web push, and SMS to create tailored customer experience, which led to a **49x ROI and a 700%** increase in customer acquisitions.[14]

Sephora launched an AI-powered chatbot across multiple platforms to deliver personalized beauty advice, product recommendations, and real-time support. It resolved 75% of inquiries autonomously, cut response times to under 10 seconds, reduced cart abandonment by 18%, and lowered service costs by 20%, making it a key driver of customer satisfaction and retention.[15]

Note: By AI/ AI tools we mean traditional AI tools or generative AI or agentic AI.

"AI is fundamentally transforming how consumers engage with brands, technology, and with each other. The ground rules are being rewritten, and enterprises need to reimagine the future of interfaces, search, commerce, and advertising in an era of agent-augmented consumer engagement."

Craig Suckling

Chief AI Officer Europe,
Insights & Data, Capgemini

Consumer demand is translating into real-world usage

Agentic commerce

In November 2025, **Google** launched agentic shopping features inside its artificial intelligence (AI) mode that allow users to search for products, check inventory, monitor prices and authorize the system to complete purchases when conditions are met.[16]

Conversational commerce

In October 2025, **Walmart** partnered with **OpenAI** on an "Instant Checkout" feature inside ChatGPT that supports shopper conversations, offers tailored bundles, and allows consumers to complete purchases in-chat. This extends to helping shoppers design meal plans and restocking lists.[17]

Conversational commerce

In September 2025, **OpenAI** introduced Instant Checkout in ChatGPT in partnership with Etsy and Shopify, allowing merchants to be able to sell directly through ChatGPT conversations.[18]

AI-powered browser

In July 2025, **Perplexity** launched **Comet**, an AI-powered web browser that allows users to perform multi-step tasks like comparing flight prices across multiple sites, creating spreadsheets, or searching LinkedIn for jobs, through simple conversational commands.[19]

AI is boosting hyper-personalization

Hyper-personalization is redefining consumer engagement across industries. Organizations use AI for this purpose, with measurable benefits such as increased customer loyalty, higher conversion rates, and improved operational efficiency.
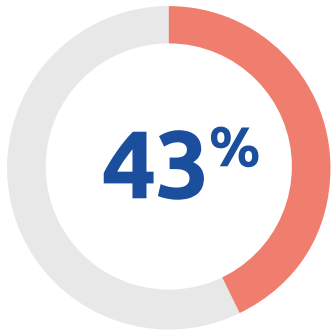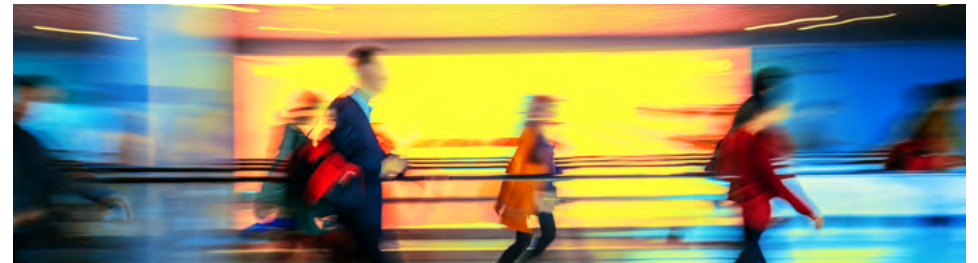
43% of consumers welcome **hyper-personalized** advertising produced by AI in their social media accounts.

Consumers living with parents, relatives, or guardians show the highest comfort level with hyper-personalized advertisements **(52%)**, significantly exceeding the openness among those living alone **(34%).**

Source: Capgemini Research Institute, AI and consumers survey, October 2025, N = 9,222 consumers who are aware and/or use AI.
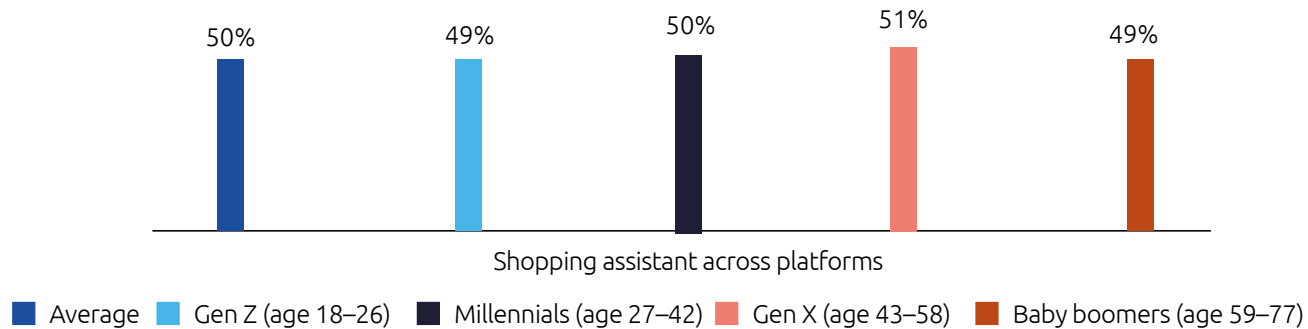Note: By AI/ AI tools we mean traditional AI tools or generative AI or agentic AI.

- **Starbucks' Deep Brew AI** personalizes customer experience by analyzing data such as purchase history, weather, and location to suggest tailored drinks and streamline store operations. Starbucks reports that adoption of AI has resulted in an upsurge of 30% in their return on investment (ROI), and 15% growth in customer engagement levels, compared with their previous marketing methods.[20]
- In October 2025, **Amazon** launched its "Help Me Decide" shopping assistant, which analyzes browsing and purchase history to recommend products, giving clear reasons for the recommendations.[21]

The shift to AI agentic commerce

Imagine a future where AI is integrated seamlessly into everyday life. How comfortable would you be with AI systems?
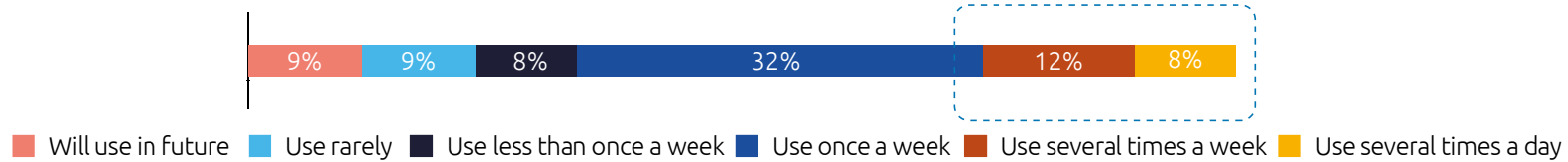

Shopping assistant across platforms

- Average
- Gen Z (age 18–26)
- Millennials (age 27–42)
- Gen X (age 43–58)
- Baby boomers (age 59–77)

Bar values: 50%, 49%, 50%, 51%, 49%

Source: Capgemini Research Institute, AI and consumers survey, October 2025, N = 9,222 consumers who are aware and/or use AI.

These figures indicate a shift from traditional browsing to **agentic commerce**, where AI agents research, compare, and purchase on behalf of users, reshaping the customer journey into a seamless, hyper-personalized experience. For organizations, this presents a significant opportunity to redefine customer engagement and gain competitive advantage. According to studies, more than **three in four** retailers agree AI agents will be essential to stay competitive.[22]

One in five consumers currently use chatbots and virtual assistants several times a week for automating and planning purchases

AI agents will be driving autonomous purchasing

Currently using or likely to use chatbots or virtual assistants that automate reordering and meal planning based on purchase history, preferences, and recipe inputs

| 9% | 9% | 8% | 32% | 12% | 8% |

■ Will use in future ■ Use rarely ■ Use less than once a week ■ Use once a week ■ Use several times a week ■ Use several times a day

Source: Capgemini Research Institute, What consumers want survey, October 2025, n = 6,000 consumers.

In January 2025, Samsung partnered with Instacart to integrate AI-powered grocery ordering into smart refrigerators, allowing users to automatically detect low-stock items and add them to Instacart carts for checkout.[23]

With 42% of consumers saying they understand AI agents and their capabilities, the industry is poised for a major shift in future toward autonomous purchasing, as organizations actively prepare for this next level of automation.

> "Agentic commerce is a fundamental shift that will reshape how consumers discover, search, and purchase products. In the coming years, shoppers will embrace AI agents that discover products, compare options, negotiate prices, and complete purchases to give them exactly what they want, at prices that work for them."[24]

Matt Renner

President, Global Revenue
Google Cloud

Consumer preferences for AI agents across sectors

Imagine a future where AI is integrated seamlessly into everyday life. How comfortable would you be with AI systems making decisions for you?

Financial services

43% Reviews terms and conditions (summarizes lengthy documents)

41% Fraud detection and monitoring (uses historical data to detect suspicious activity and alert users)

Automotive

59% Smart navigation and route planner (Suggests optimal routes based on traffic and weather)

56% Vehicle maintenance reminder (Alerts you when your car needs service or inspections)

Public services

51% Assistant to support completion of government forms

45% Tax return assistant that ensures compliance with public policy

Medical

42% Medical appointment scheduler (Books and manages doctor visits based on your availability and preferences)

42% Medication reminder and refill agent (Reminds you to take medications and orders refills automatically)

Telecommunication

54% Device compatibility checker (checks whether devices support specific networks or services)

49% Plan optimization agent (analyzes usage and recommends the most suitable mobile/internet plans)

Consumer products

50% Returns and warranty handling (Manages product returns, exchanges, and warranty claims without manual effort)

50% Subscription management (Monitors and manages your subscriptions, including cancellations and upgrades)

Source: Capgemini Research Institute, AI and consumers survey, October 2025, n= 9,222 consumers who are aware and/or use AI.

> *"AI adoption in the consumer goods industry is moving beyond experimentation to driving real value across commercial and operational use cases. Successful scaling of AI for the enterprise hinges on the ability to mobilize all of your data with a relentless focus on driving business outcomes."*

Freddy Guard

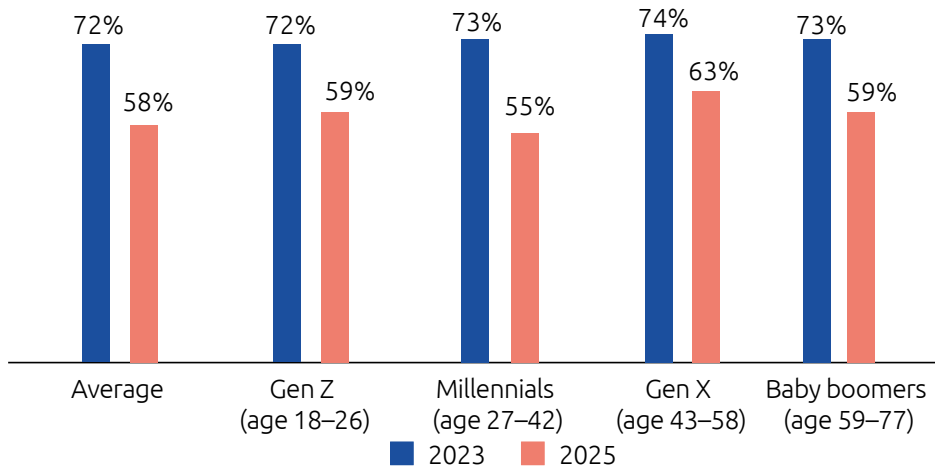Head of Industry GTM - Consumer Goods, Americas at Snowflake

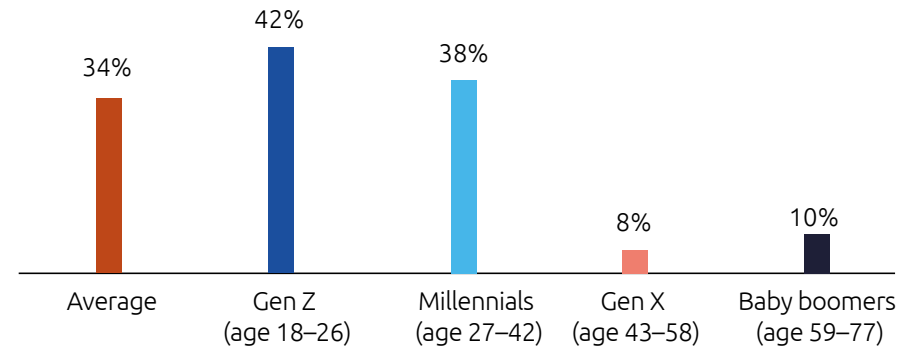# 06

Trust erosion:
AI's key challenge

Trust has declined in two years among all age groups including Gen Zs

I trust content written by generative AI

	Average	Gen Z (age 18–26)	Millennials (age 27–42)	Gen X (age 43–58)	Baby boomers (age 59–77)
2023	72%	72%	73%	74%	73%
2025	58%	59%	55%	63%	59%

I usually trust AI tools recommendations without having to double-check the response by humans

Average	Gen Z (age 18–26)	Millennials (age 27–42)	Gen X (age 43–58)	Baby boomers (age 59–77)
34%	42%	38%	8%	10%

Source: Capgemini Research Institute, AI and consumers survey, October 2025, N = 9,222 consumers who are aware and/or use AI; Why consumers love Gen AI survey, April 2023, N = 8,596 consumers.
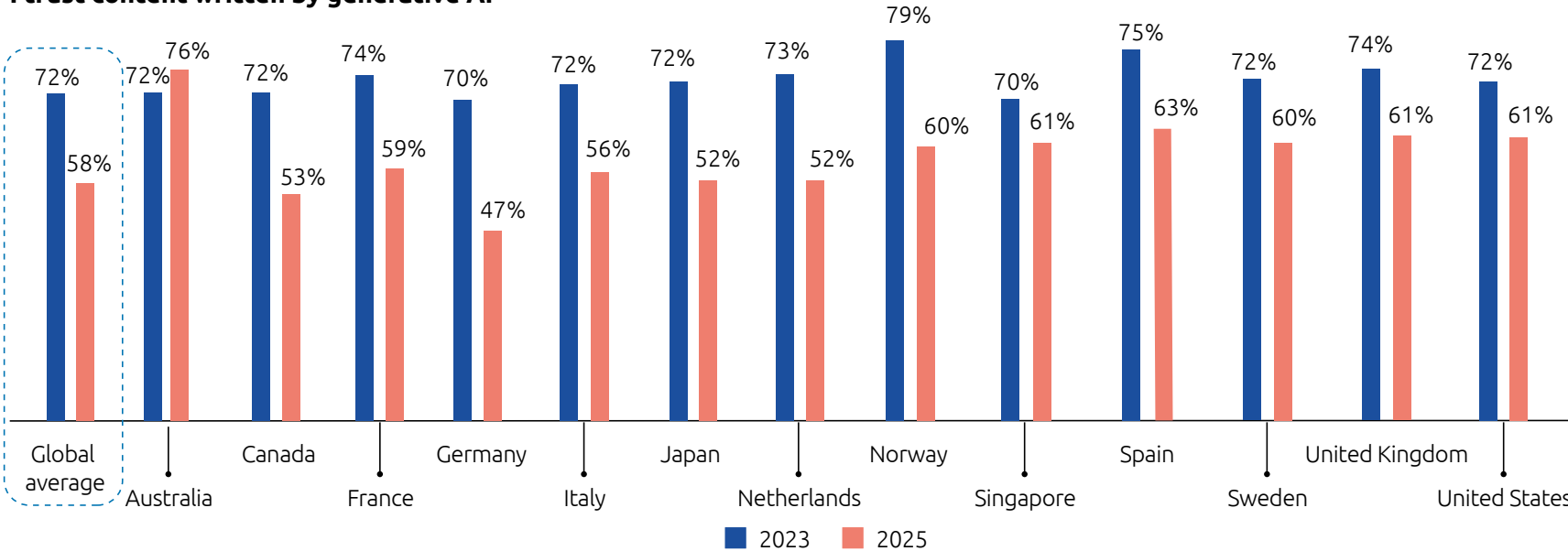
Source: Capgemini Research Institute, AI and consumers survey, October 2025, N = 9,222 consumers who are aware and/or use AI.

Trust in AI is falling across countries, as usage rises

I trust content written by generative AI

Country	2023	2025
Global average	72%	58%
Australia	72%	76%
Canada	72%	53%
France	74%	59%
Germany	70%	47%
Italy	72%	56%
Japan	72%	52%
Netherlands	73%	52%
Norway	79%	60%
Singapore	70%	61%
Spain	75%	63%
Sweden	72%	60%
United Kingdom	74%	61%
United States	72%	61%

■ 2023   ■ 2025

Only around two in five organizations have overall trust in Gen AI for decision-making.[25]
Consumer trust in AI is higher than that of business executives owing to the direct personal benefits and fewer perceived risks.
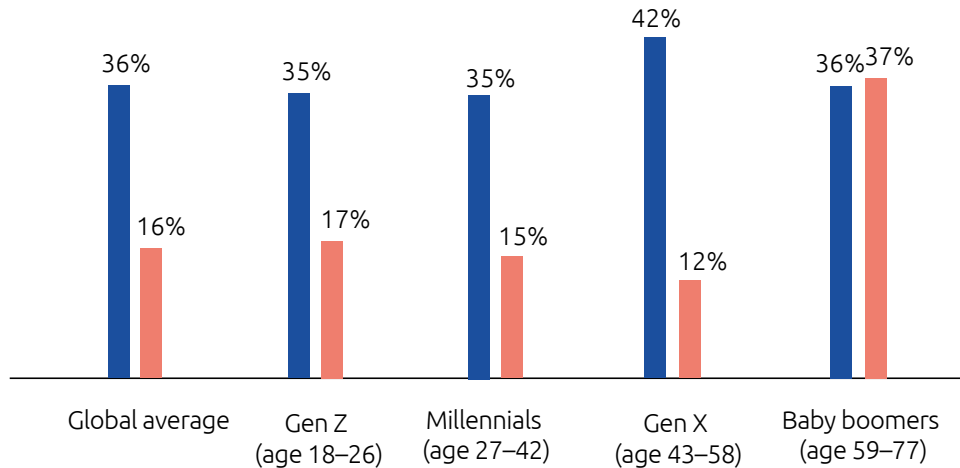
> *"Consumers are ready for AI, they're already spending hours daily with these tools. But they're waiting for someone to earn their trust. The winners will be the companies that close the trust gap while their competitors are still debating deployment."*

Dinand Tinholt

Vice President
Global Consumer Products and Retail Lead Data & AI,
Capgemini

37% of baby boomers are concerned about AI challenges

Which of the following best describes overall consumer perception of AI tools?

Category	I see both benefits and risks	I am mostly concerned about dangers
Global average	36%	16%
Gen Z (age 18–26)	35%	17%
Millennials (age 27–42)	35%	15%
Gen X (age 43–58)	42%	12%
Baby boomers (age 59–77)	36%	37%

■ I see both benefits and risks with AI; it's useful but can also be misused or create new challenges.

■ I am mostly concerned about the dangers of AI, such as potential misuse, including gaining unfair advantages (such as cheating in exams), and potential loss of human skills.

47% of consumers say that the line between human and AI-generated content is increasingly blurred.

Surging security fears are a challenge, and an opportunity

In the past two years, concerns about cyberattacks have almost doubled.

Concerned about cyberattacks, such as creating sophisticated malware or breaching security systems using generative AI
- 27%
- 53%

■ 2023   ■ 2025

Source: Capgemini Research Institute, AI and consumers survey, October 2025, N = 9,222 consumers who are aware and/or use AI.
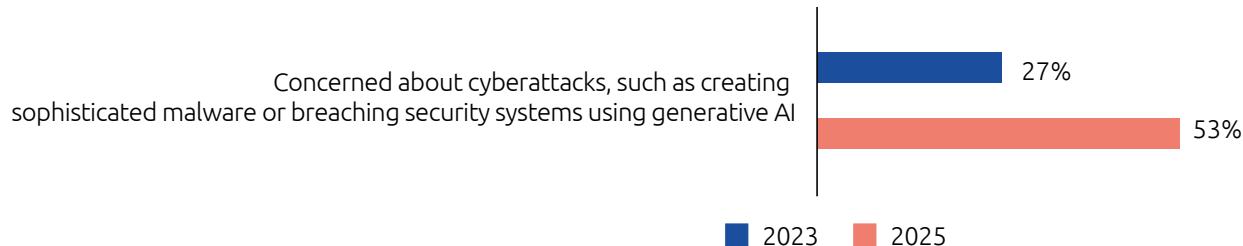
Consumers are increasingly expressing their concerns regarding various trust challenges

Which of the following are you most concerned about in relation to the usage of AI tools?
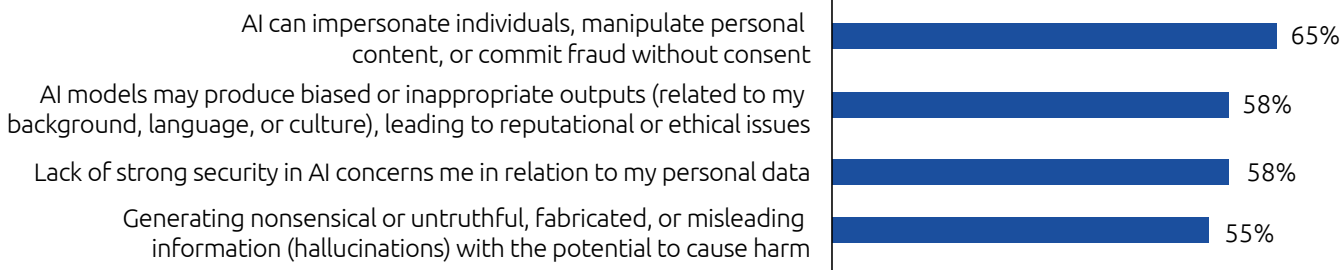
AI can impersonate individuals, manipulate personal content, or commit fraud without consent — 65%

AI models may produce biased or inappropriate outputs (related to my background, language, or culture), leading to reputational or ethical issues — 58%

Lack of strong security in AI concerns me in relation to my personal data — 58%

Generating nonsensical or untruthful, fabricated, or misleading information (hallucinations) with the potential to cause harm — 55%
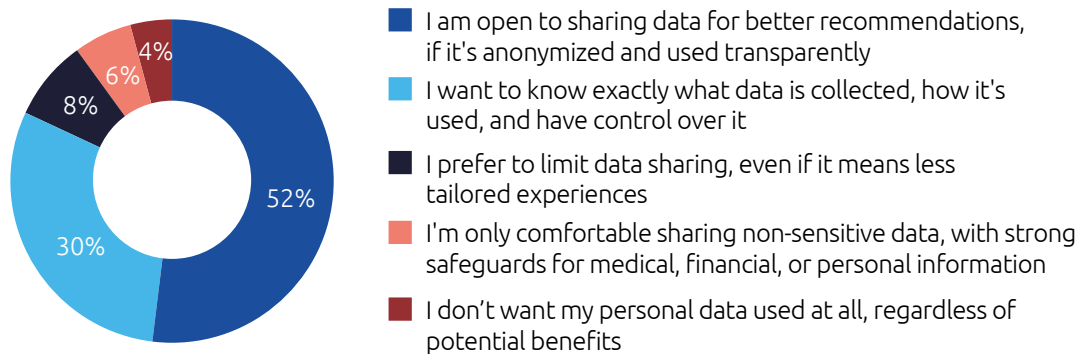
Source: Capgemini Research Institute, AI and consumers survey, October 2025, N = 9,222 consumers who are aware and/or use AI.

53% of consumers are now ready to pay a premium for AI tools that guarantee data safety and cybersecurity protection.

Consumers want control over their data

Trade-off between privacy and personalization

- 52%
- 30%
- 8%
- 6%
- 4%

- ■ I am open to sharing data for better recommendations, if it's anonymized and used transparently
- ■ I want to know exactly what data is collected, how it's used, and have control over it
- ■ I prefer to limit data sharing, even if it means less tailored experiences
- ■ I'm only comfortable sharing non-sensitive data, with strong safeguards for medical, financial, or personal information
- ■ I don't want my personal data used at all, regardless of potential benefits

Source: Capgemini Research Institute, AI and consumers survey, October 2025, N = 9,222 consumers who are aware and/or use AI.

In the current AI-driven ecosystem, consumers want to retain control over their digital experience. **Nearly 3 in 5 (58%)** consumers want the power to opt-out completely of all AI services, without losing access to basic digital services. This sentiment is strongest among Australian consumers, 3 in 4 of whom see this.

Furthermore, **58%** of respondents report concerns regarding the access and use of their personal data by AI tools, underscoring the importance of transparency and robust data governance in AI adoption.

Consumers expect transparency, accountability, and guardrails

57% of consumers say **AI development should slow down** to allow organizations to put proper governance and safety measures in place. This is higher in Australia at 71% and lower in Japan at 44%.
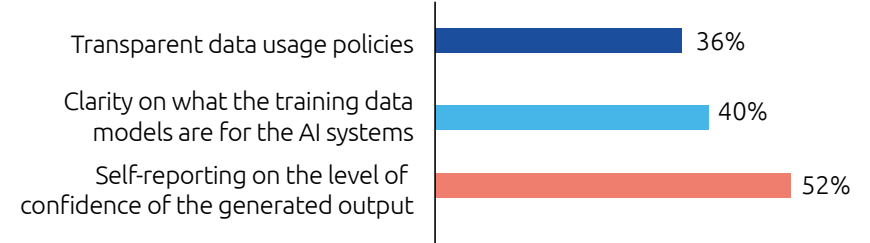
67% of consumers say AI developers should be legally responsible if their tools cause harm.

61% state that there should be strict limits on using AI to create fake political content, pictures, videos, or audio.

63% of consumers say AI should be tested with diverse groups before launch, with proof of this testing shared in plain language.

Source: Capgemini Research Institute, AI and consumers survey, October 2025, N = 9,222 consumers who are aware and/or use AI.

Percentage of consumers responding to the question: "What would make you trust AI more?(Top three ranks)

Transparent data usage policies	36%
Clarity on what the training data models are for the AI systems	40%
Self-reporting on the level of confidence of the generated output	52%

Source: Capgemini Research Institute, AI and consumers survey, October 2025, N = 9, 222 consumers who are aware and/or use AI.

Rapid adoption of AI tools without first establishing trust may ultimately hinder long-term value generation and scaling. Meanwhile, **two in three** consumers say they place greater trust in a digital assistant when it backs its recommendations and actions with clear explanations.[26] More organizations, including OpenAI, Adobe, and Microsoft are adopting Coalition for Content Provenance and Authenticity (C2PA). Establishing an open technical standard will embed verifiable metadata in AI-generated media, enabling consumers and platforms to trace origin, tools, and any edits made to these AI-generated media.[27]

Consumers have only a vague awareness of the scale of AI's carbon footprint

Awareness of carbon footprint generated by AI tools is low

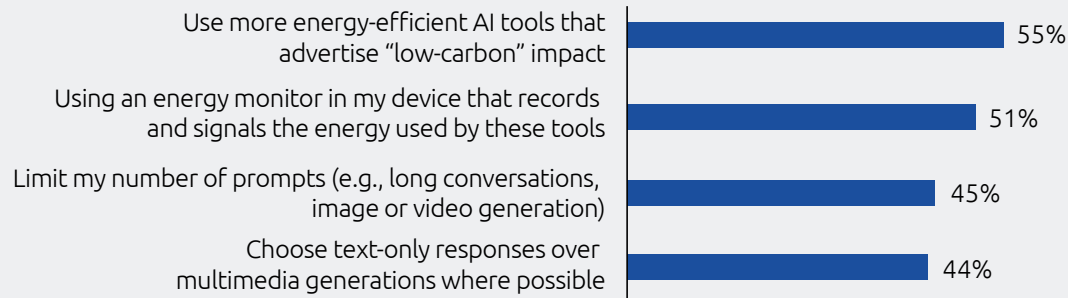| Statement	Percentage
Composing a 100-page report through generative AI platforms consumes as much energy as running a petrol-, diesel-, or gas-powered five-seater vehicle for approximately 80 meters (0.05 miles)	25%
The energy used for a single Generative AI image generation consumes as much energy as running a petrol-, diesel-, or gas-powered five-seater vehicle for approximately 28 meters (or 0.0176 miles)	19%
The energy consumed to generate a five-minute audio through generative AI platforms is as much as running a petrol-, diesel-, or gas-powered five-seater vehicle for approximately 240 meters (or 0.15 miles)	18%
The energy consumed to generate a two-minute video through generative AI platforms is as much as running a petrol-, diesel-, or gas-powered five-seater vehicle for approximately 6.4 km (or 4 miles)	15%
The cooling systems needed for the servers handling every 1,000 generative AI queries can consume approximately 15–50 litres (13–40 gallons) of water – comparable to the water used in 250 – 750 standard five-minute low flow showers	12%
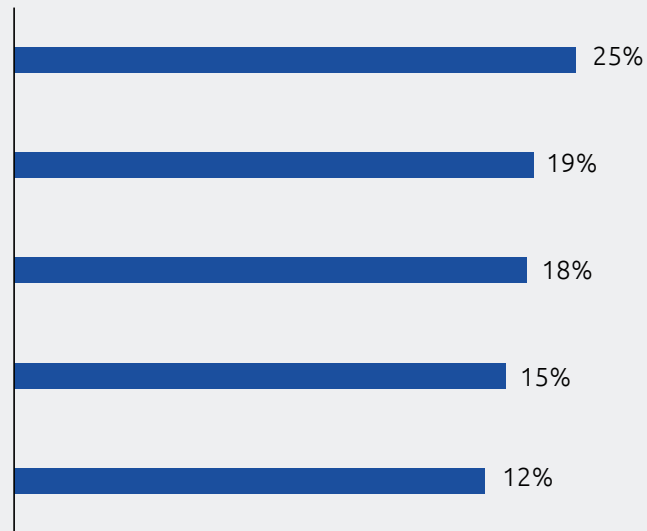
Source: Capgemini Research Institute, AI and consumers survey, October 2025, N = 9,222 consumers who are aware and/or use AI.
Note: Above statements are the estimated carbon footprint for generative AI prompts.

Nevertheless, consumers want their AI usage to be mindful of the carbon footprint

Which of the following actions would you be willing to take to reduce the environmental impact of using AI tools in your daily life?

Action	Percentage
Use more energy-efficient AI tools that advertise "low-carbon" impact	55%
Using an energy monitor in my device that records and signals the energy used by these tools	51%
Limit my number of prompts (e.g., long conversations, image or video generation)	45%
Choose text-only responses over multimedia generations where possible	44%

■ Percentage of consumers willing to take an action

Source: Capgemini Research Institute, AI and consumers survey, October 2025, N = 9,222 consumers who are aware and/or use AI.

PromptZero uses a simple modification to trim every AI prompt, cutting computational load and CO2, without sacrificing clarity.[28]

According to Google, the median Gemini App's text prompt uses 0.24 watt-hours (Wh) of energy, equivalent to watching TV for less than 9 seconds.[29]

54% of organizations agree that Gen AI has a higher carbon footprint than traditional IT programs, however only **20%** of the organizations are currently measuring the specific environmental footprint of their Gen AI.[30]

07

Recommendations

Improve consumer trust in AI through an ethical approach

- Implement **guardrails** to limit the impact of **hallucinations, fake content, impersonation, manipulation or fraud**.
- Build **transparency** with consumers on key topics such as what **data** is used for model training, subsequent use of their data inputs and the ability to **opt out**, outcomes of tests, and the **level of confidence** for generated output.
- Manage **biases**.
- Define required levels of **human oversight** and be transparent with consumers.
- **Clarify accountability** within the AI life-cycle for scenarios where there could be harm.
- Be **transparent** about the **environmental footprint** of AI implementations.

Prioritize data safety and cybersecurity

- Let **consumers control the data** they want, and be transparent on how the data is used.
- **Give granular controls to consumers** to build trust as privacy-preserving technologies should be a fundamental part of design. Any process that needs to share private data should take a privacy-first approach.
- **Inform consumers about** the data-validation protocols around the **source, usage rights, access controls, and processing methods** used by AI.

Reimagine data visibility and discoverability in the age of AI

- Rethink **how data is structured, surfaced, visible, and optimized** for AI interfaces.
- **Optimize for GEO**. Ensure your products and content are discoverable via AI-driven search and assistants.

Revise pricing and operating models

- Develop **premium AI offerings** to capture **willingness-to-pay**.
- Harness AI for **hyper-personalization at scale**.
- **Tailor AI experiences** to consumer adoption patterns across demographics.

Prepare for an Agentic commerce future

- **Introduce agentic elements** into shopping flow.
- Start recommending **more AI agents** to **consumers**.

> *"Successful, confident adoption of AI relies not just on creating AI that works, but on creating AI that works reliably, is aligned to human expectations, and that works in people's best interests."*

Robert Engels

Vice President and Head of Generative AI Lab, CTO, Insights & Data, Capgemini

08

Research methodology

Research methodology

We surveyed 10,000 consumers between the ages of 18 and 80 from 13 countries across the US, Europe, and Asia-Pacific. The global survey took place in October 2025. The demographic details of consumers are below:

Consumers by age split
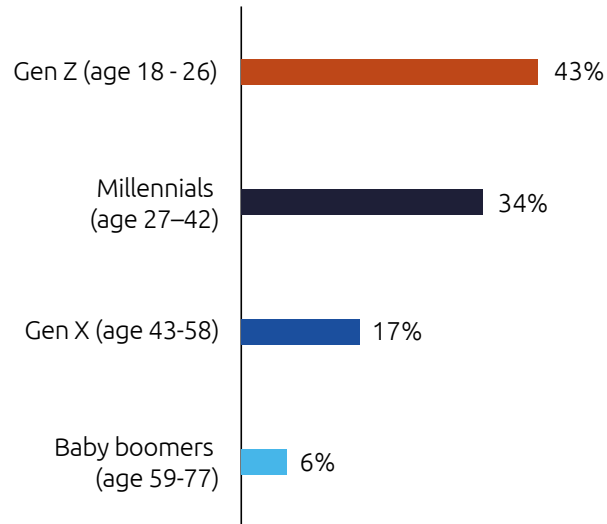
Age group	Percentage
Gen Z (age 18 - 26)	43%
Millennials (age 27–42)	34%
Gen X (age 43-58)	17%
Baby boomers (age 59-77)	6%

Source: Capgemini Research Institute, AI and Consumers survey, October 2025, N = 10,027 consumers.

Consumer split by education
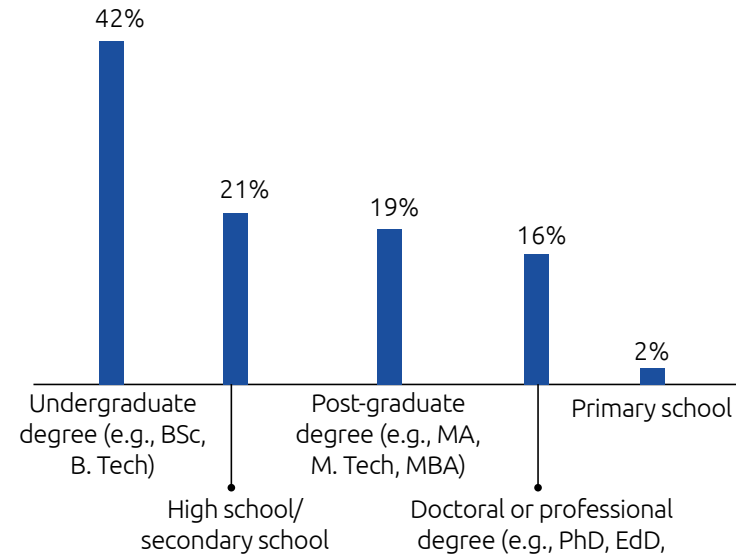
Education	Percentage
Undergraduate degree (e.g., BSc, B. Tech)	42%
High school/ secondary school	21%
Post-graduate degree (e.g., MA, M. Tech, MBA)	19%
Doctoral or professional degree (e.g., PhD, EdD,	16%
Primary school	2%

Source: Capgemini Research Institute, AI and consumers survey, October 2025, N = 10,027 consumers.

Research methodology
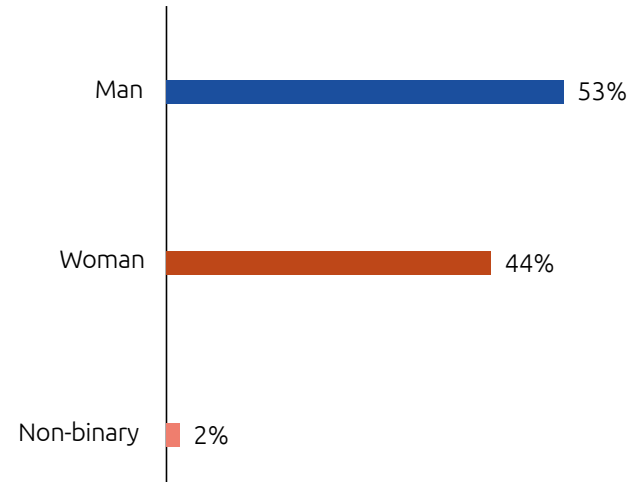
Consumer split by country of residence
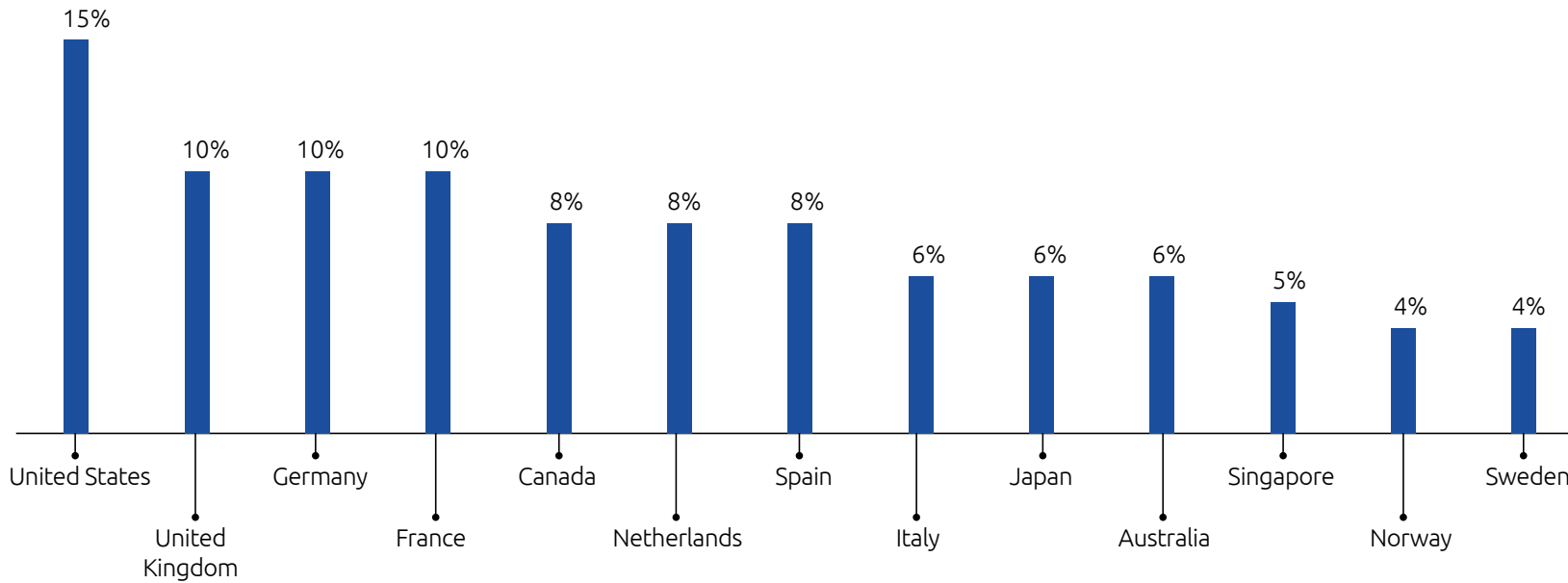
Country	Percentage
United States	15%
United Kingdom	10%
Germany	10%
France	10%
Canada	8%
Netherlands	8%
Spain	8%
Italy	6%
Japan	6%
Australia	6%
Singapore	5%
Norway	4%
Sweden	4%

Source: Capgemini Research Institute, AI and Consumers survey, October 2025, N = 10,027 consumers.

Research methodology

Consumer split by employment

Category	Percentage
Full-time employed	55%
Part-time employed	19%
Full-time student	8%
Unemployed	8%
Self-employed, consultant, or freelancer	6%
Retired	3%
In the military	1%
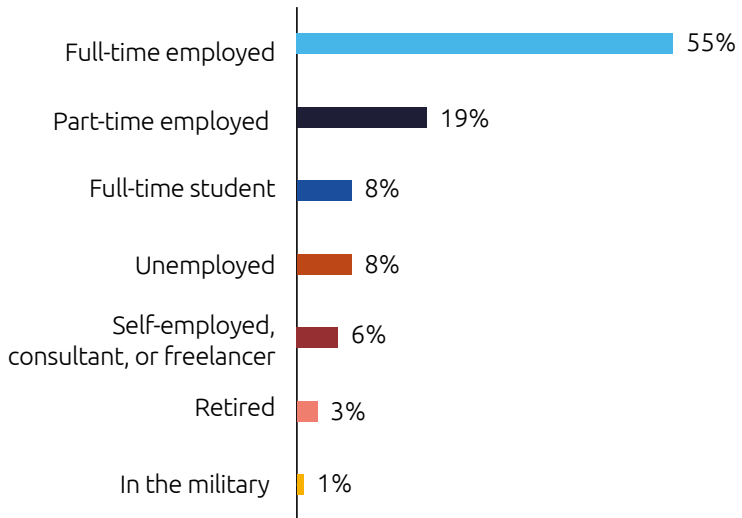
Consumer split by self-identified gender

Category	Percentage
Man	53%
Woman	44%
Non-binary	2%

Source: Capgemini Research Institute, AI and consumers survey, October 2025, N = 10,027 consumers.

Resonance AI Framework by Capgemini

The Resonance AI Framework by Capgemini provides a sequential approach to the successful conceptualization, structuring, and implementation of AI-driven transformation. It helps business leaders realize AI's potential and achieve market leadership, regardless of the industry. Anchored in transformation strategy, the framework helps integrate operations and culture while accelerating AI value creation – to both transform today and build for tomorrow.

WAVES OF AI VALUE

HUMAN-AI-CHEMISTRY
Adoptation to collaboration

AI READINESS

AI ESSENTIALS
Tech to data

ADOPT

ADAPT
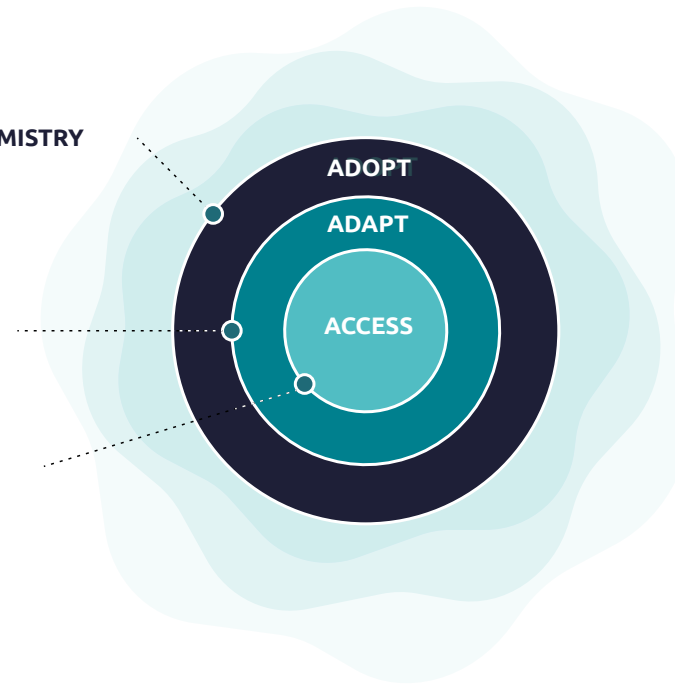
ACCESS

Transform Now
Operational efficiency
Hyper-personalized experience

Build Tomorrow
Business (re)invention
Next frontier innovation

AI essentials

To access the transformative power of AI, organizations must establish "intelligence-as-a-service." That includes scalable and robust enterprise data foundations combined with advanced language and vision models, and applications with built-in AI capabilities. These provide the foundation to build, operate, and scale AI with real, enterprise-specific impact.

AI-readiness

Adapting AI to organizational context requires the right enablers and guardrails to secure, govern, customize, and operationalize usage. Success hinges on the ability to empower an organization to scale AI while ensuring secure, ethical usage aligned with organizational goals and standards. Organizations must build trusted data foundations and manage these as a business resource.

Human-AI chemistry

Organizations adopt hybrid forms of collaboration by designing the clear roles and intuitive interactions that enable seamless collaboration between humans and AI. This mutual reliability and collaboration defines "human-AI chemistry" – the new catalyst of innovation and the defining success factor in your AI journey.

Waves of value

With the technological, governance, and collaborative foundations in place, AI value creation is poised to accelerate across an organization, ready to deliver the operational efficiency, personized experiences, business reinvention, and next-frontier innovation that enable an organization to transform today and build for tomorrow.

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Having joined the Capgemini Group in 2017, Etienne dedicated his initial four years to the Public Services sector in France and later expanded his scope globally within Capgemini Invent. He is an expert in AI and agentic AI products,healthcare and administration transformations and an essayist (Génération réenchantée, Calmann-Lévy, 2016) and columnist for Les Echos.

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Craig is the Chief AI Officer for Capgemini Insights & Data, Europe. Before joining Capgemini, Craig was Chief Data Officer for the UK Government, accountable for the Government's strategy and change agenda for data and AI, and he was also the global head of Data and AI strategy for Amazon Web Services. Craig has also held numerous roles as a private sector CDO, startup founder and advisory board member. He featured in the top 100 data and AI leaders in Europe in 2020-2025, and the top 100 global data and AI leaders in 2024.

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Dreen Yang is Global Industry Leader for Consumer Products & Retail at Capgemini, driving strategic growth across 50+ countries. With deep FMCG expertise and leadership at Coca-Cola, he's launched $100M+ ventures and revitalized billion-dollar brands. Dreen excels at transforming complexity into opportunity through data-driven strategy and next-gen tech.

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Anne-Violaine was previously Capgemini Group Ethics Officer since 2019, she is passionate about nurturing a sustainable ethical culture. Earlier in her career, she was responsible for the creation of Capgemini's Integrated Report, and the introduction of integrated thinking.

She has a strong finance background, having held positions in corporate and operational finance, internal and external audit, as well as transformation programs, notably in the outsourcing services part of Capgemini's portfolio.

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Prior to joining Capgemini, Mark was the CTO of AI and Analytics at Sogeti Global, where he developed the AI portfolio and strategy. Before that, he worked as a Practice Lead for Data Science and AI at Sogeti Netherlands, where he started the Data Science team, and as a Lead Data Scientist at Teradata and Experian. Throughout his career, Mark has worked with clients from various markets around the world and has used AI, deep learning, and machine learning technologies to solve complex problems.

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Steve specializes in AI transformation of 'retailing' – he is leading our offer development for how AI and other new technologies impact the e2e CX of our clients and their customers – from creating and launching new customer experiences and propositions to transforming capability and operations of marketing, omni-commerce, store experience, customer service, CRM, and loyalty.

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Robert (Dr. Bob) Engels is also serving as CTO, AI for the Insights & Data Business Line. He has a long track record in the fields of AI, cognitive psychology, and knowledge presentation. Before joining Capgemini, he worked for startups, angel investors, and the Oslo municipality, had his own startup, oversaw radio and television production infrastructures with AI, and built a digital (AI-based) experience center for popular music. Robert holds a master's degree in cognitive psychology and AI, and a PhD in AI and reasoning.

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Xavière is a data-driven digital transformation expert with a strong focus on leveraging AI to reshape both customer experiences and organizational models. Passionate about innovation, Xavière drives AI-powered brand and organizational transformations, helping businesses adapt to a new era where artificial intelligence disrupts shopping behaviors and redefines ways of working.

With multi-industry expertise, Xavière combines strategic vision and operational excellence to deliver impactful, future-ready solutions that accelerate growth and enhance competitiveness.

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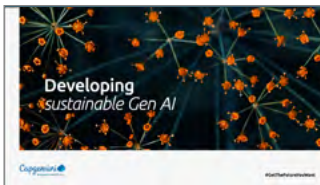**Rise of agentic AI: How trust is the key to human-AI collaboration**

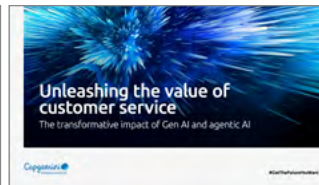**AI in action: How Gen AI and agentic AI redefine business operations**

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