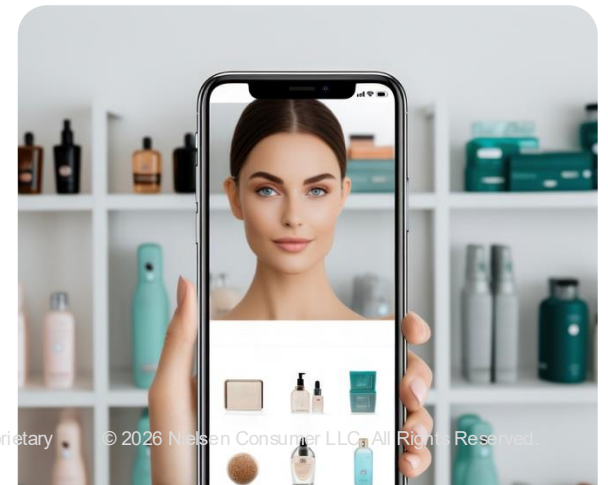


## The New Shape of Shopping: How Agentic Commerce Transforms the Path to Purchase

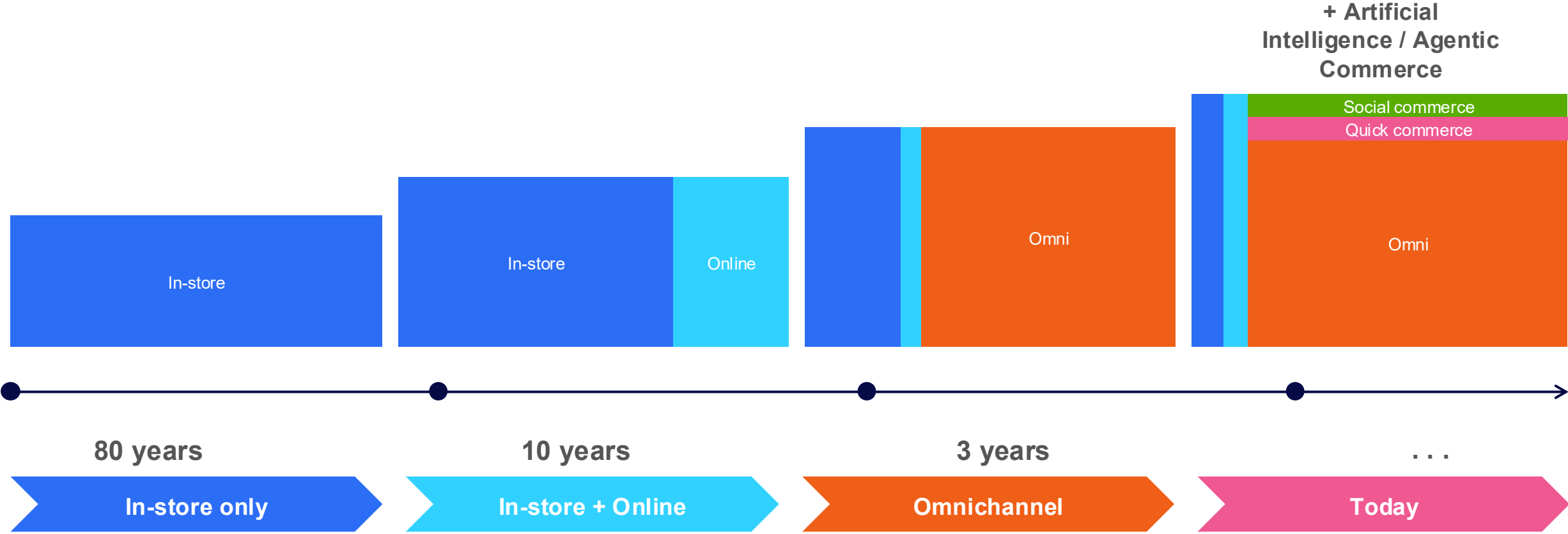
June 2026



# The omni landscape today

eCommerce, omni, and digital innovation have increased the pace of change in retail

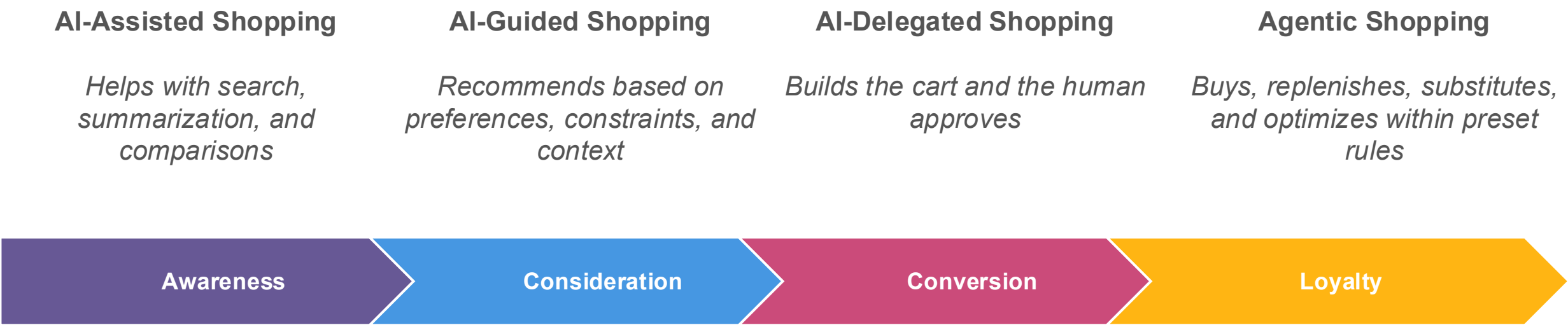
The pace of change is accelerating rapidly



Source: NIQ

# “Agentic Shopping” should first be defined

AI will play many roles in the shopper journey before reaching a true “agentic” status



Source: NIQ

# Retailer AI and Generalist LLM AI have unique nuances

|               | Retailer AI                                                                                                                                                                                                       | Generalist AI                                                                                                                                                            |
|---------------|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Inputs        | <ul style="list-style-type: none"><li>• Product Pages</li><li>• Product Catalogs</li><li>• Ratings, Reviews, FAQs</li><li>• Inventory Levels and In-Store Availability</li><li>• Historic Purchase Data</li></ul> | <ul style="list-style-type: none"><li>• Blog Posts and Expert Review Sites</li><li>• Accessible Retailer Sites</li><li>• YouTube and Reddit</li></ul>                    |
| Signals       | <ul style="list-style-type: none"><li>• Content Alignment to Shopper Mission</li><li>• Local Relevance</li><li>• Ads and Sponsored Products</li><li>• Utilization of Digital Shelf Content</li></ul>              | <ul style="list-style-type: none"><li>• Credibility of Expertise</li><li>• Brand Mentions</li><li>• Product Information</li><li>• Completeness of Product Data</li></ul> |
| Brand Actions | <ul style="list-style-type: none"><li>• Optimize PDPs</li><li>• Review and Promote Reviews</li><li>• Utilize All Content Types Available</li><li>• Optimize Inventory Accuracy</li></ul>                          | <ul style="list-style-type: none"><li>• Build Authority Across Internet Sources</li><li>• Ensure Product Data and Information Completeness</li></ul>                     |



# Almost half of Americans have recently used AI to shop; two-thirds are considering usage

**42%** have used at least one AI tool to shop within the past month



**19%** used **subscribe or auto-replenish** features



**17%** used AI-powered **product recommendations**



**12%** used a **chatbot that guided** them through a purchase

**68%** have considered using at least one AI tool to shop



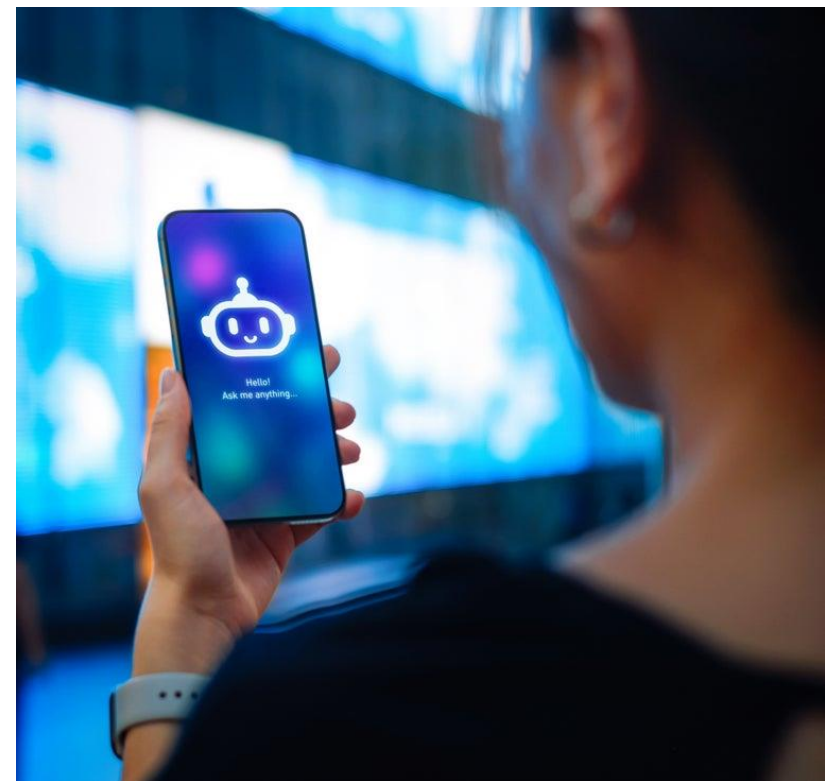
**27%** considered AI-powered **product recommendations**



**26%** considered AI-powered **shopping list**



**22%** considered AI-powered **personal shopping assistant**



Source: NIQ AI Monthly Tracker, Note: Data on this page will be trended monthly as part of an ongoing tracker of AI adoption. Contact [Jason.boyd@nielseniq.com](mailto:Jason.boyd@nielseniq.com) to learn more

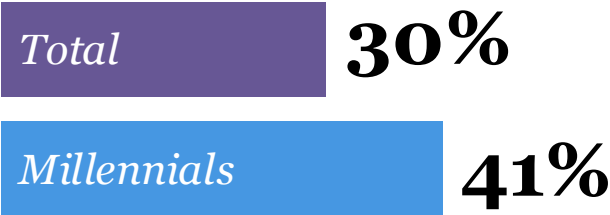
Americans are beginning to demonstrate openness to AI's benefits for shopping

Younger generations are more open

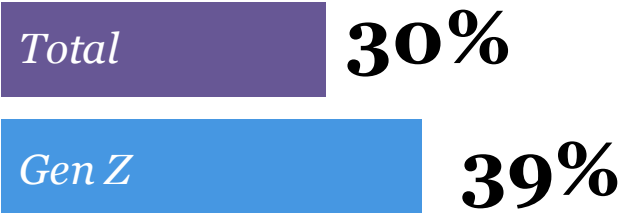
“Artificial intelligence will make **online shopping** more personalized”



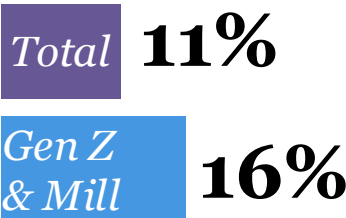
Use AI to “**Get recommendations on what to purchase**”



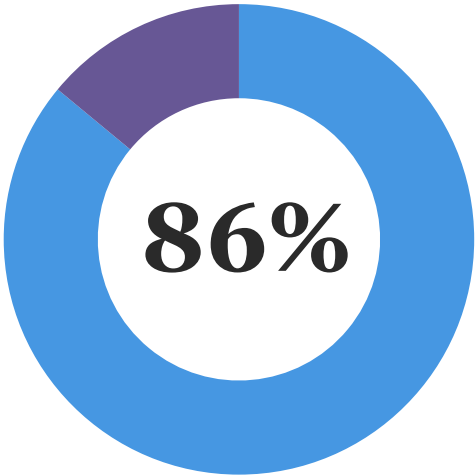
“**Having less choice** makes it easier for me to make a purchase decision”



“**AI generated summaries or recommendations** would make me **try a new product**”

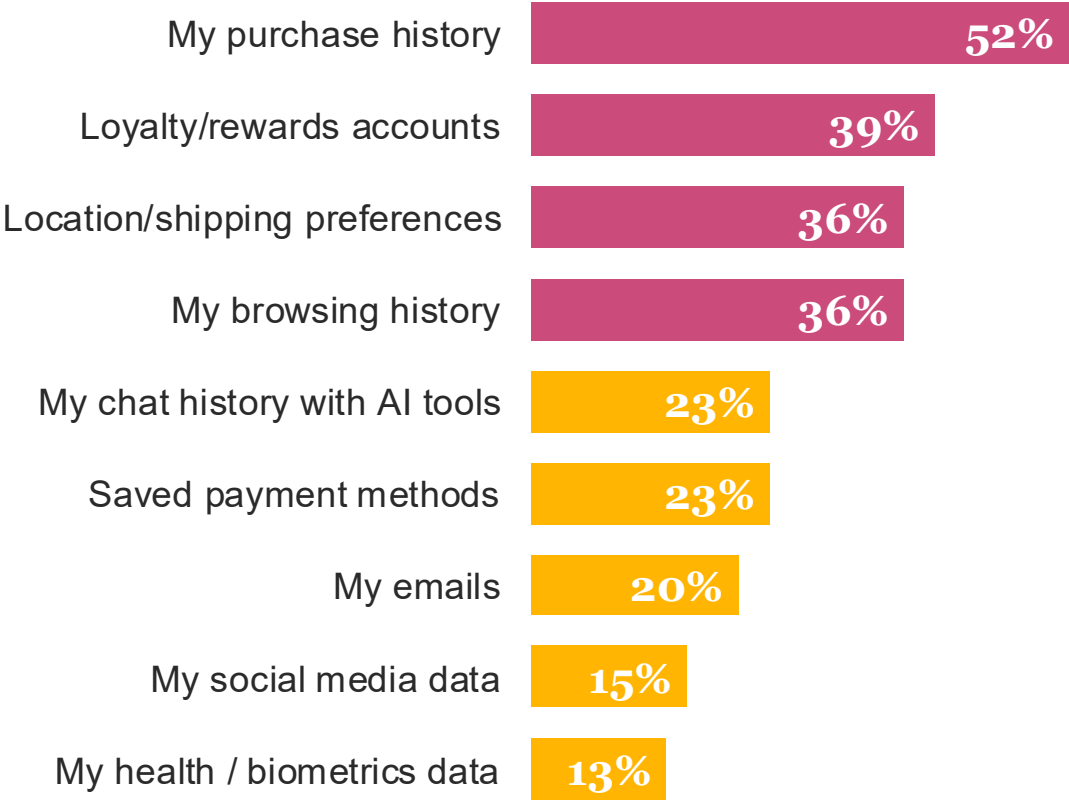


# Most consumers are comfortable sharing at least some data with AI tools & agents, prioritizing shopping-relevant data such as purchase & browsing history, loyalty account, and shipping preferences



are **comfortable** sharing some personal data with AI tools / agents

*among those who have used or considered using AI for shopping in P30D*

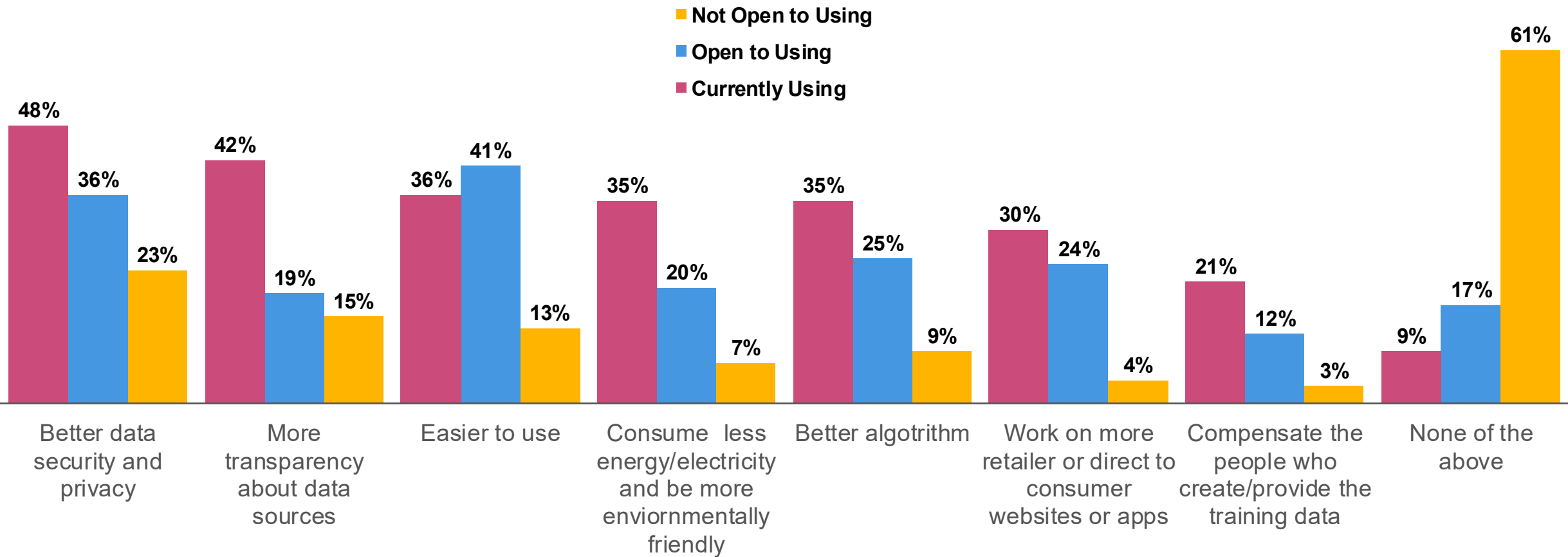


Source: NIQ AI Monthly Tracker, Note: Data on this page will be trended monthly as part of an ongoing tracker of AI adoption. Contact [Jason.boyd@nielseniq.com](mailto:Jason.boyd@nielseniq.com) to learn more

# Security, Transparency, and Ease of Use would be the biggest motivators in increasing AI usage

Will be hard to sway shoppers who are not open to using AI tools

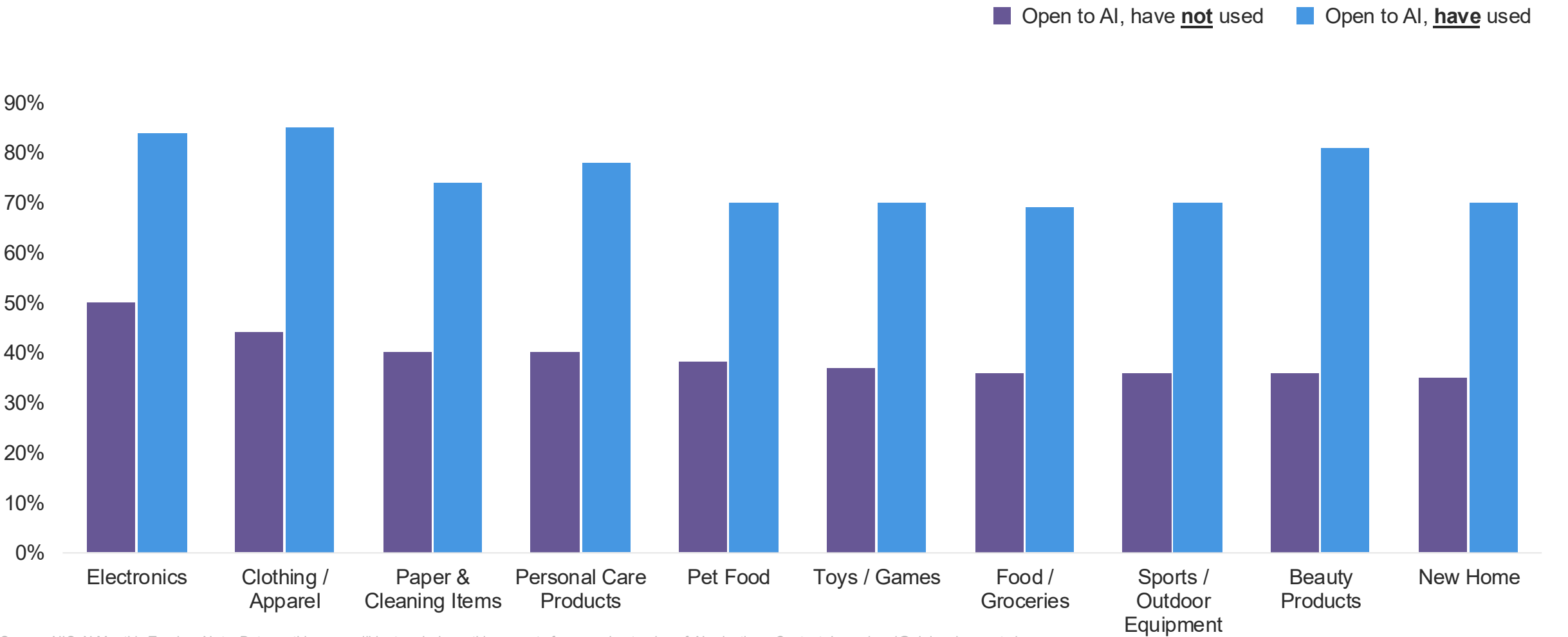
Factors to Improve AI tools Usage and Consideration



Source: NielsenIQ AI Survey, May 2026; Q: Which of the following do you wish AI would do better to help you with shopping/purchasing?

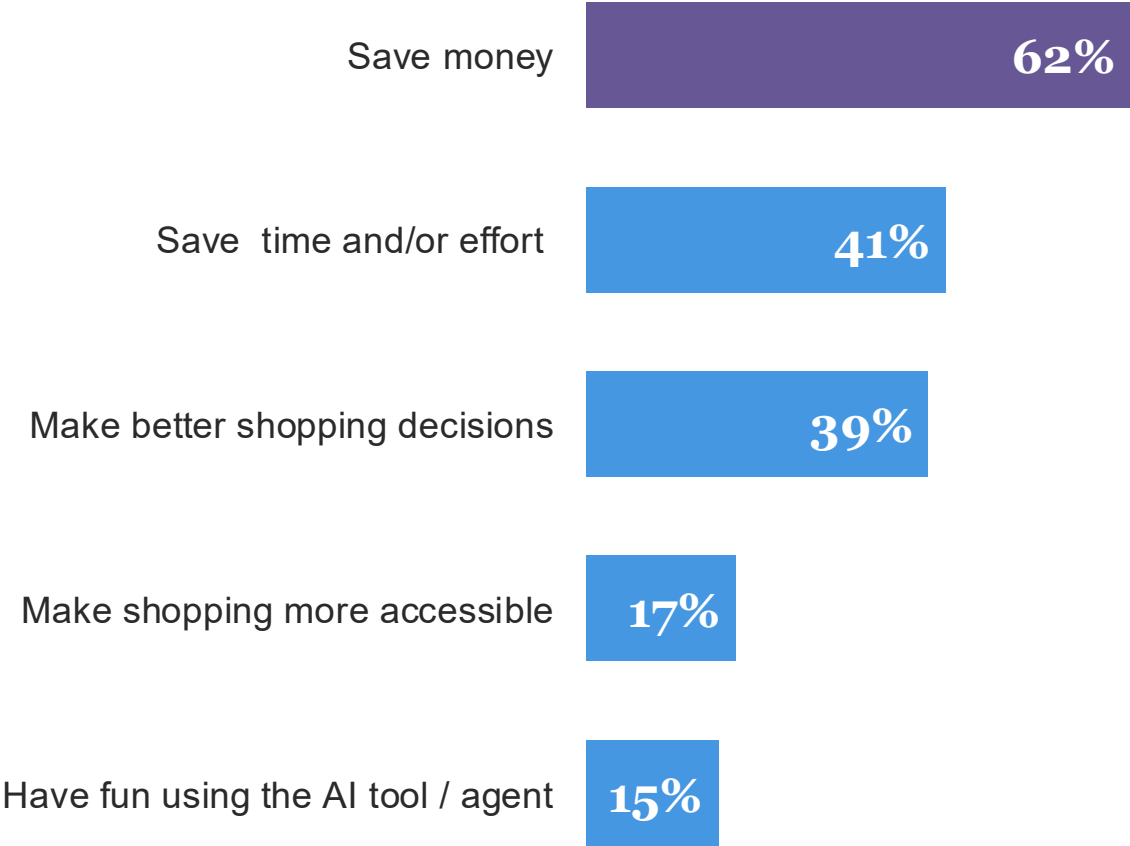
# AI shopping users and those open to it are likely to use it or consider using it for multiple categories

Would you use AI for next category purchase



Source: NIQ AI Monthly Tracker, Note: Data on this page will be trended monthly as part of an ongoing tracker of AI adoption. Contact [Jason.boyd@nielseniq.com](mailto:Jason.boyd@nielseniq.com) to learn more

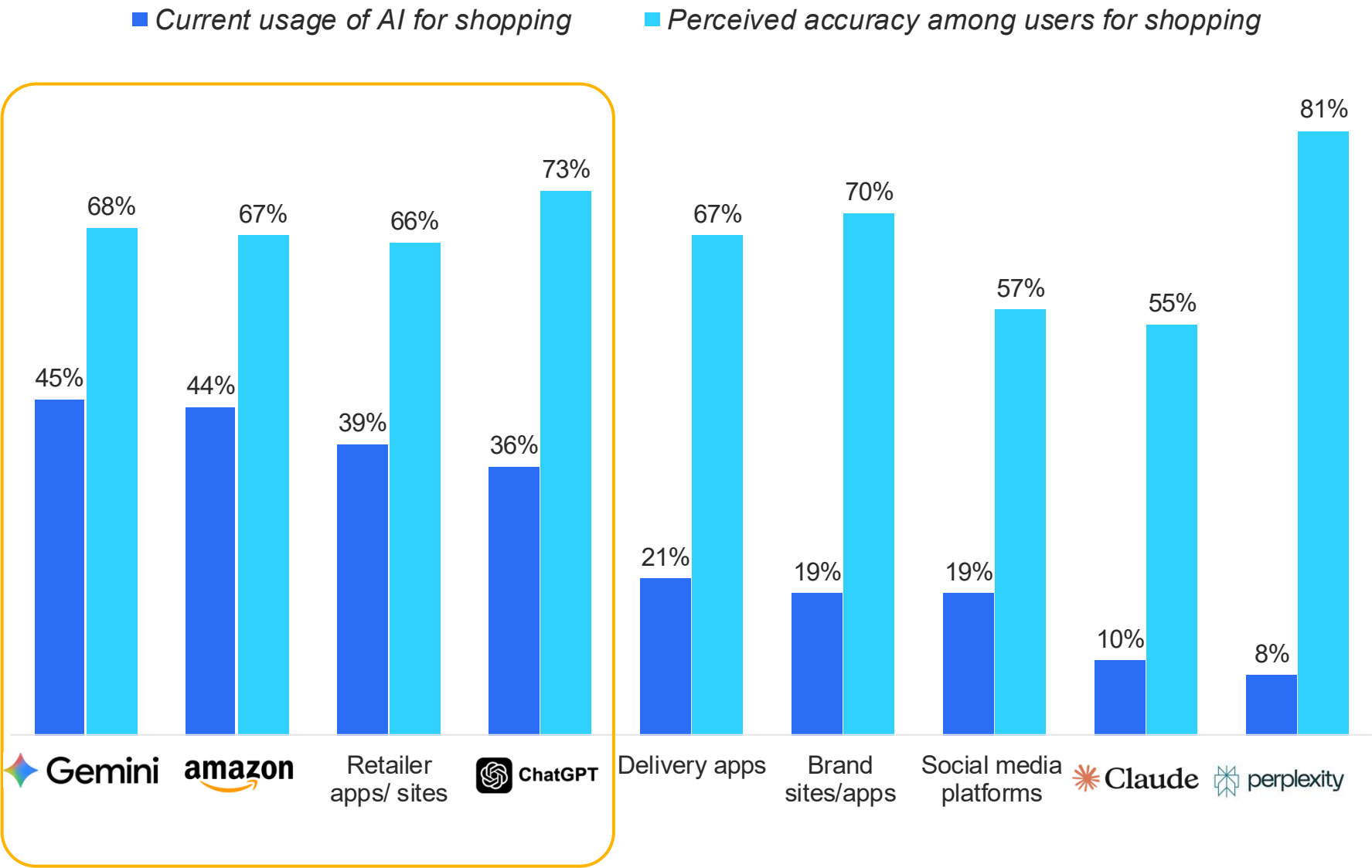
# The top motivation for using AI in shopping is to save money



Source: NIQ AI Monthly Tracker, Note: Data on this page will be trended monthly as part of an ongoing tracker of AI adoption. Contact [Jason.boyd@nielseniq.com](mailto:Jason.boyd@nielseniq.com) to learn more

Current AI usage concentrates among Google, Amazon, ChatGPT, and native platforms on retailer sites/apps

Amazon leads in satisfaction



Source: NIQ AI Monthly Tracker, Note: Data on this page will be trended monthly as part of an ongoing tracker of AI adoption. Contact Jason.boyd@nielseniq.com to learn more

# From shelf to chat: AI is the new aisle

Agentic commerce, LLM advertising, and democratized AI tools are tilting the playing field toward first movers — and rewriting how shoppers discover, evaluate, and buy

## What LLMs reward now



### Structured product data

Clean attributes, ingredients, claims — machine-readable, not just brand-poetic.



### Authentic explanatory reviews

Reddit, Substack, creator comments — "why" beats star ratings



### Need-state language

"Best X for Y," "alternative to Z" — content that answers the agent's question.



### Cultural & social signal

TikTok and YouTube traction now feeds nearly half of agentic results.

\$25B

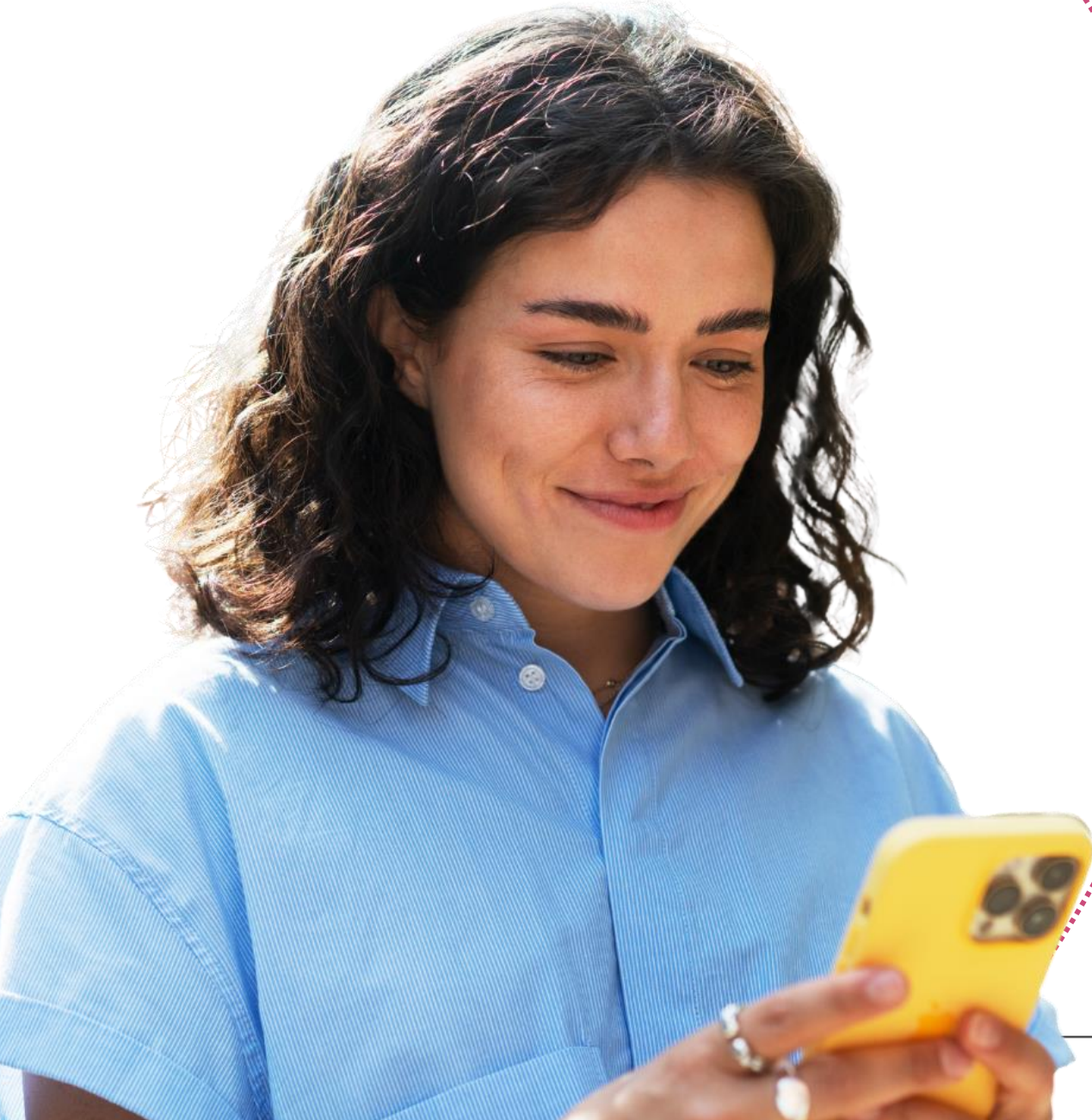
LLM advertising opportunity — a layer where contextual relevance, not budget, decides placement (for now).

10–20%

of US eCommerce spend may flow through agentic shoppers by 2030 — recasting RMN traffic and conversion economics.

Sources: NIQ × Kearney, The New Growth Frontier (Mar 2026); NIQ Innovation Vitality Meta-Analysis 2026; NIQ Consumer Outlook 2026.

## How AI Chooses Products



*Retailers*



*Reviews & ratings*



*Community signals*



*Comparison content*



*Consensus across sources*

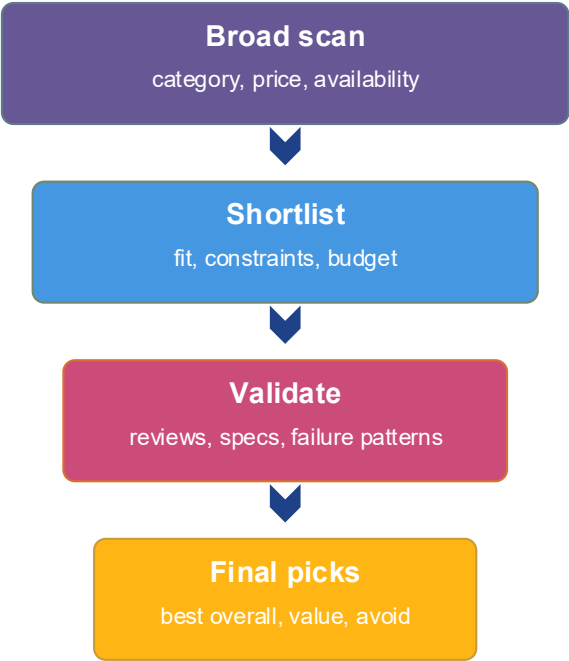
# Principles of how LLMs research product recommendations

Product recommendations use a risk-adjusted research process

## Search Depth Scales By Risk



## Results Are Narrowed Down



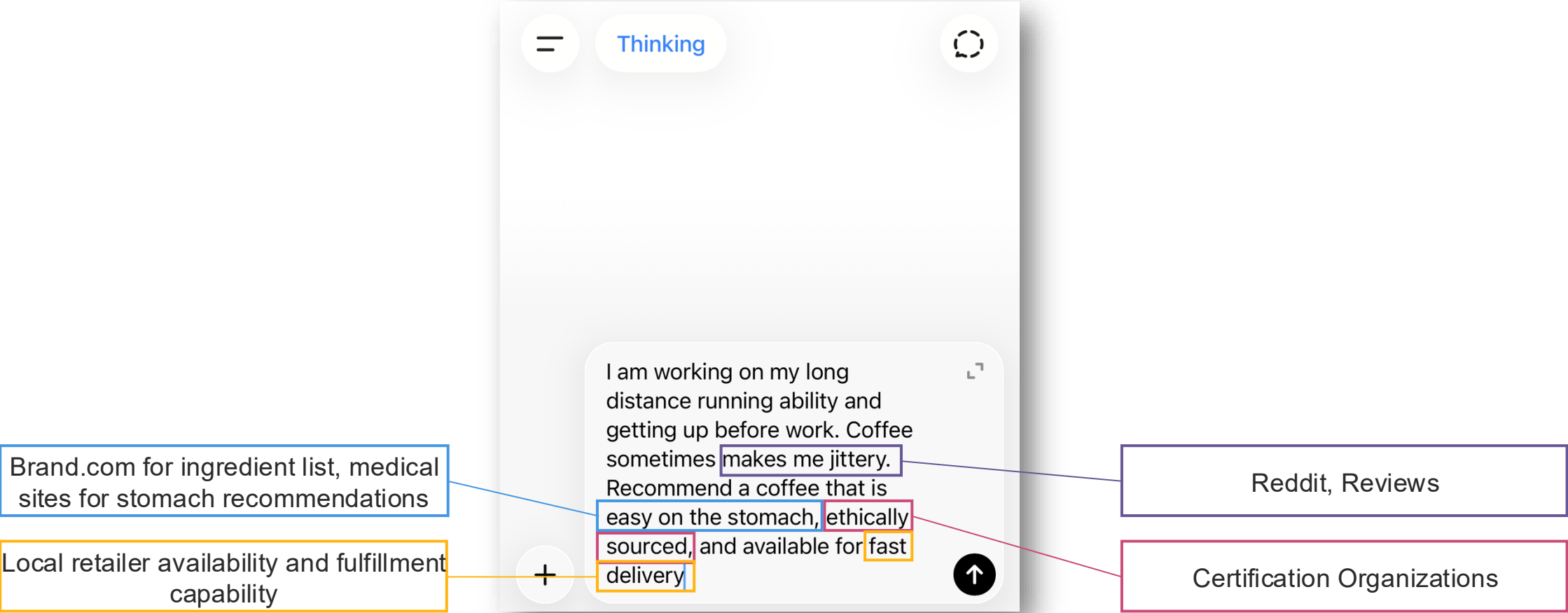
## Typical Sources

| Source                                  | Role                                                                                                                       |
|-----------------------------------------|----------------------------------------------------------------------------------------------------------------------------|
| Retailer Listings                       | Confirm current price, pack size, variants, availability, return policy, and common retailer-specific review patterns.     |
| Owner Reviews                           | Identify recurring problems such as poor durability, residue, aftertaste, quality changes, reliability issues, or defects. |
| Professional / Lab Reviews              | Use structured testing or expert comparisons for performance, quality, taste, benchmarks, or objective tradeoffs.          |
| Manufacturer Specs                      | Verify dimensions, compatibility, ingredients, certifications, warranty, technical specs, and official claims.             |
| Health / Safety / Environmental Sources | Check sensitivities, safety claims, certifications, ingredients, environmental tradeoffs, and sustainability context.      |
| Forums / Reddit / Enthusiast Sentiment  | Surface long-term ownership experience, niche use cases, formula changes, reliability issues, and community consensus.     |

Source: ChatGPT – Illustrative and Generalized

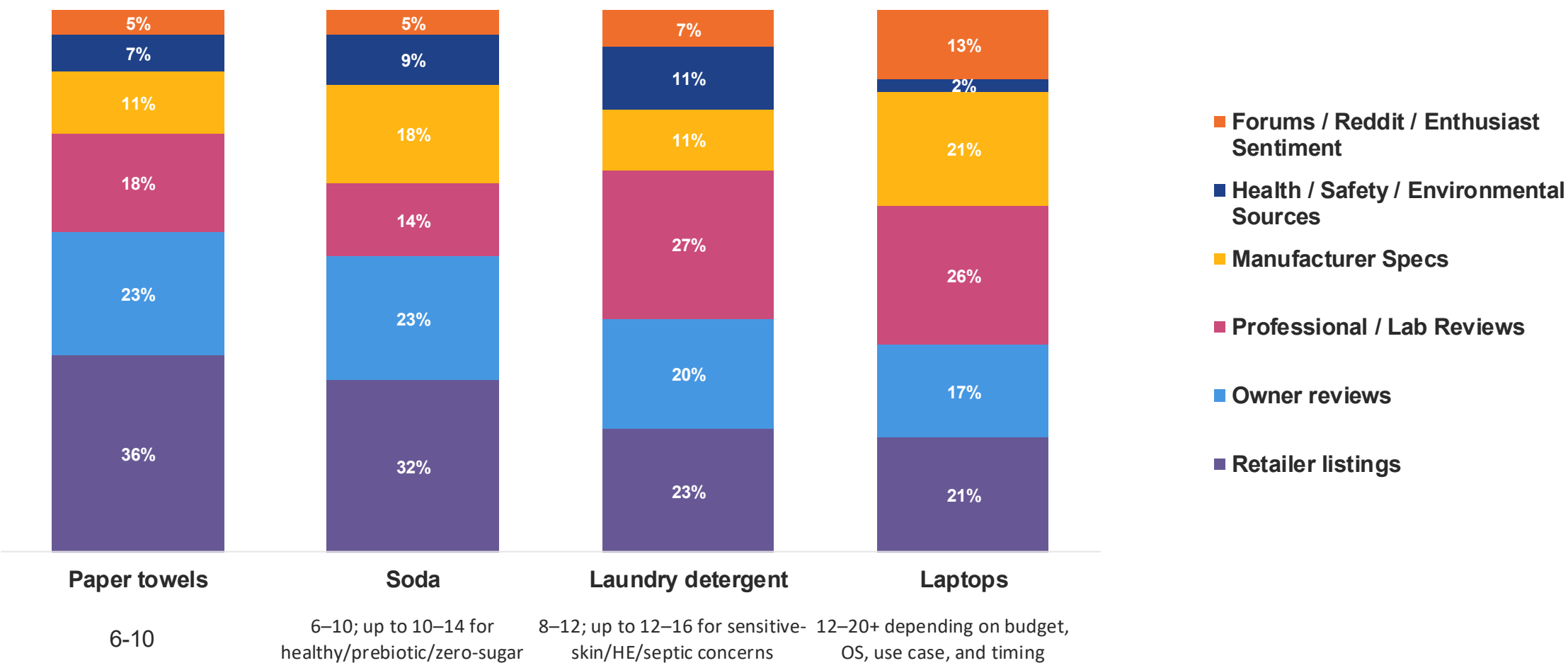
# LLMs will use different sources to validate various aspects of the shopper prompt / query

Influencing results has become a much more daunting proposition due to varied sources



# Categories will use different source types based on risk level and category realities

ChatGPT Typical Citation / Source Breakdown by Category



Source: ChatGPT methodology estimate, June 2026. Directional and reflects expected source weighting by product category, not audited historical citation counts

# The Big Shift - Search Has Changed

*From*

*To*

Ranking pages



Being recommended by AI

Keywords



Structured data

Websites



Full ecosystem presence

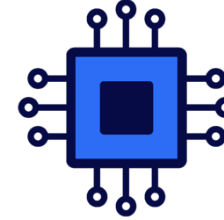


# AI-optimized content is not the same thing as human-optimized content

## Examples of Product Content:



*Rich, smooth, and expertly crafted from sustainably sourced beans. A bold yet balanced coffee experience with notes of chocolate and caramel. Perfect for starting your day or enjoying throughout the afternoon.*



**Category:** Ground Coffee

**Roast Level:** Medium

**Bean Type:** Arabica

**Origin:** Colombia, Brazil

**Flavor Notes:** Chocolate, Caramel

**Caffeine:** Regular

**Dietary:** Gluten-free, Vegan

**Package Size:** 12 oz

**Brewing Methods:** Drip, Pour-over, French Press

**Sustainability:** Rainforest Alliance Certified

**Price:** \$7.56

## Structured Data Wins

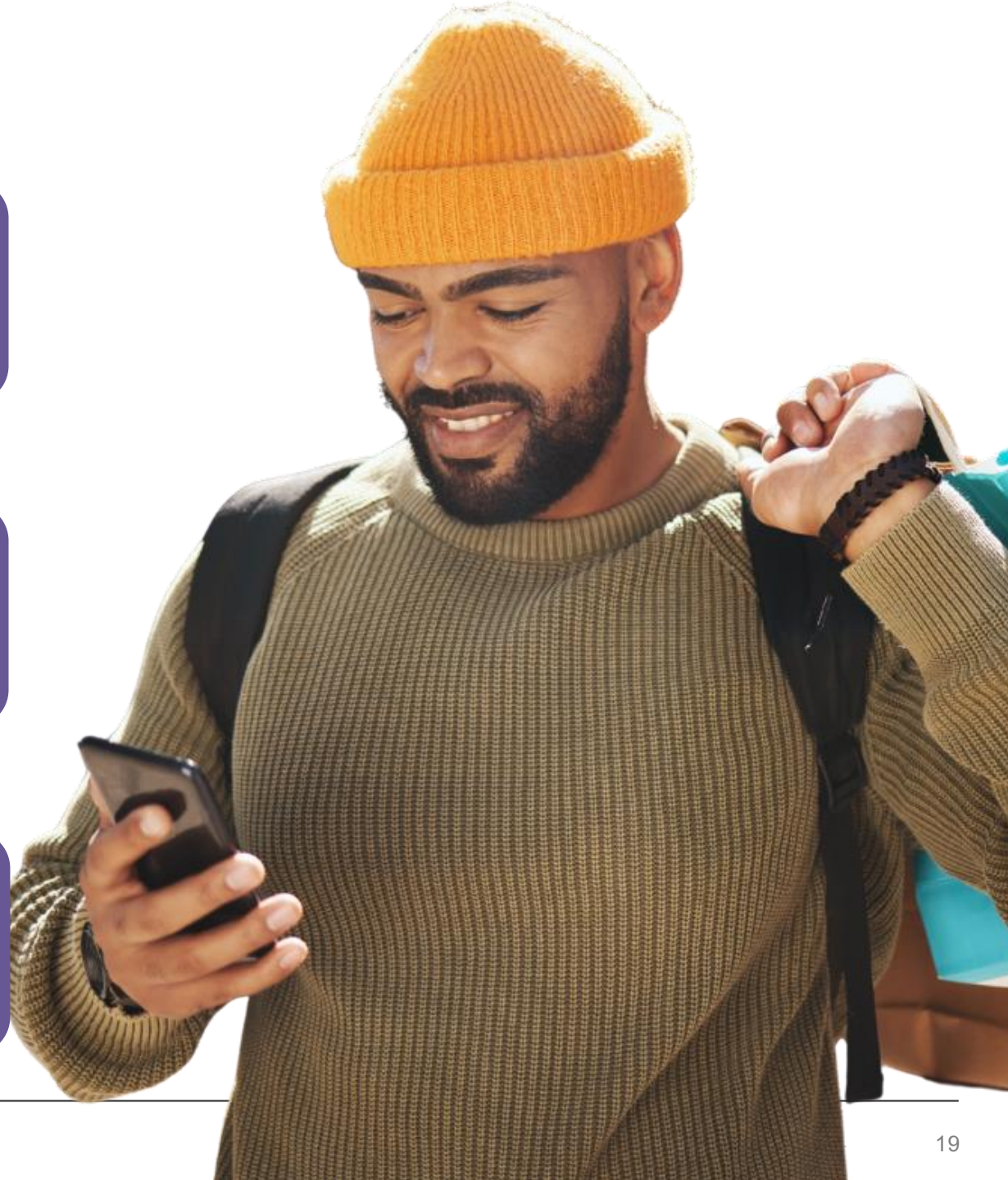
**Vague claims lose**

(e.g. *'healthy snack'*)

**Specific attributes win**

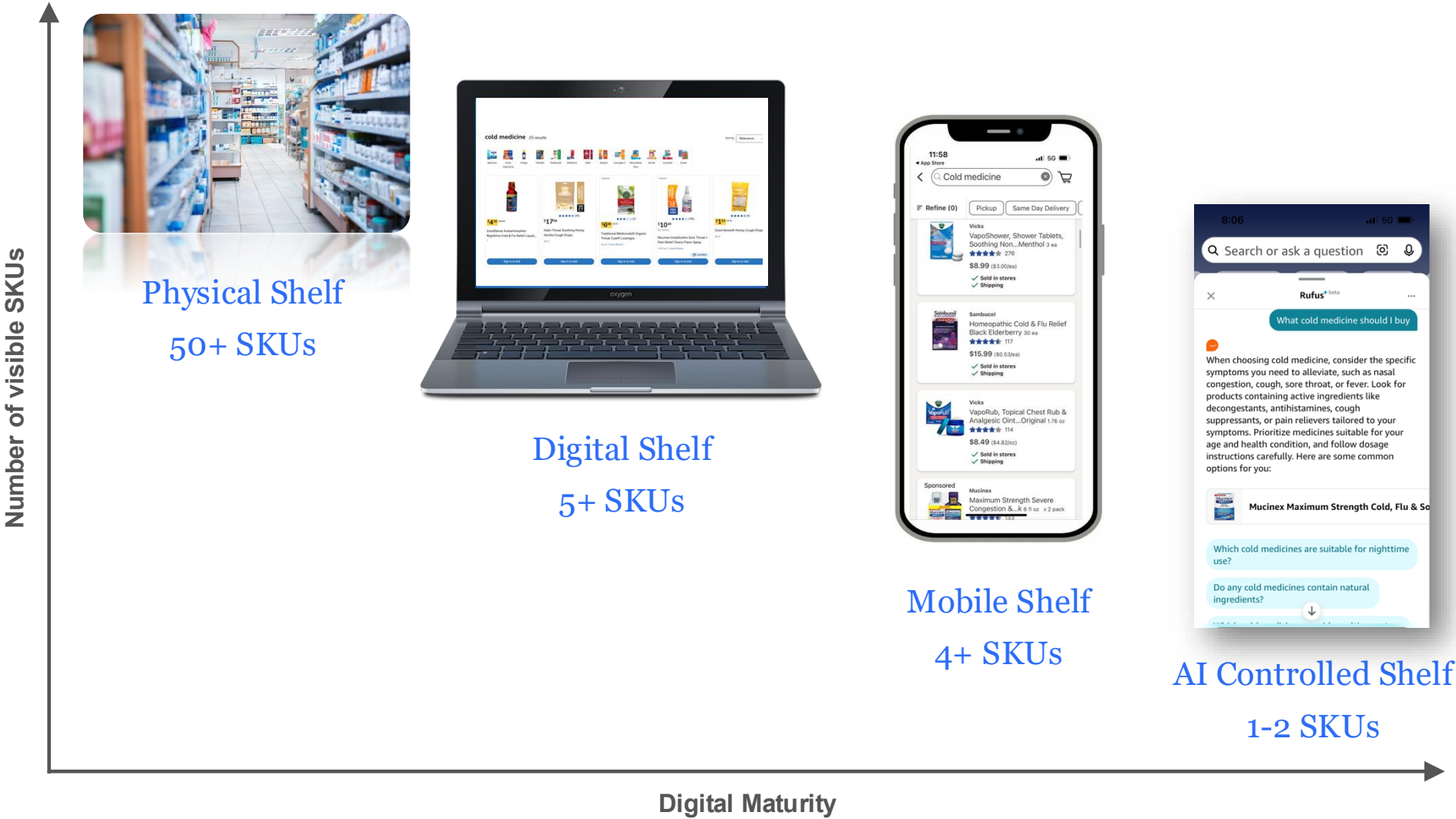
(e.g. *'protein', 'carbs', dietary claims'*)

**AI favors  
*machine-readable data***



# AI will transform shelf strategy

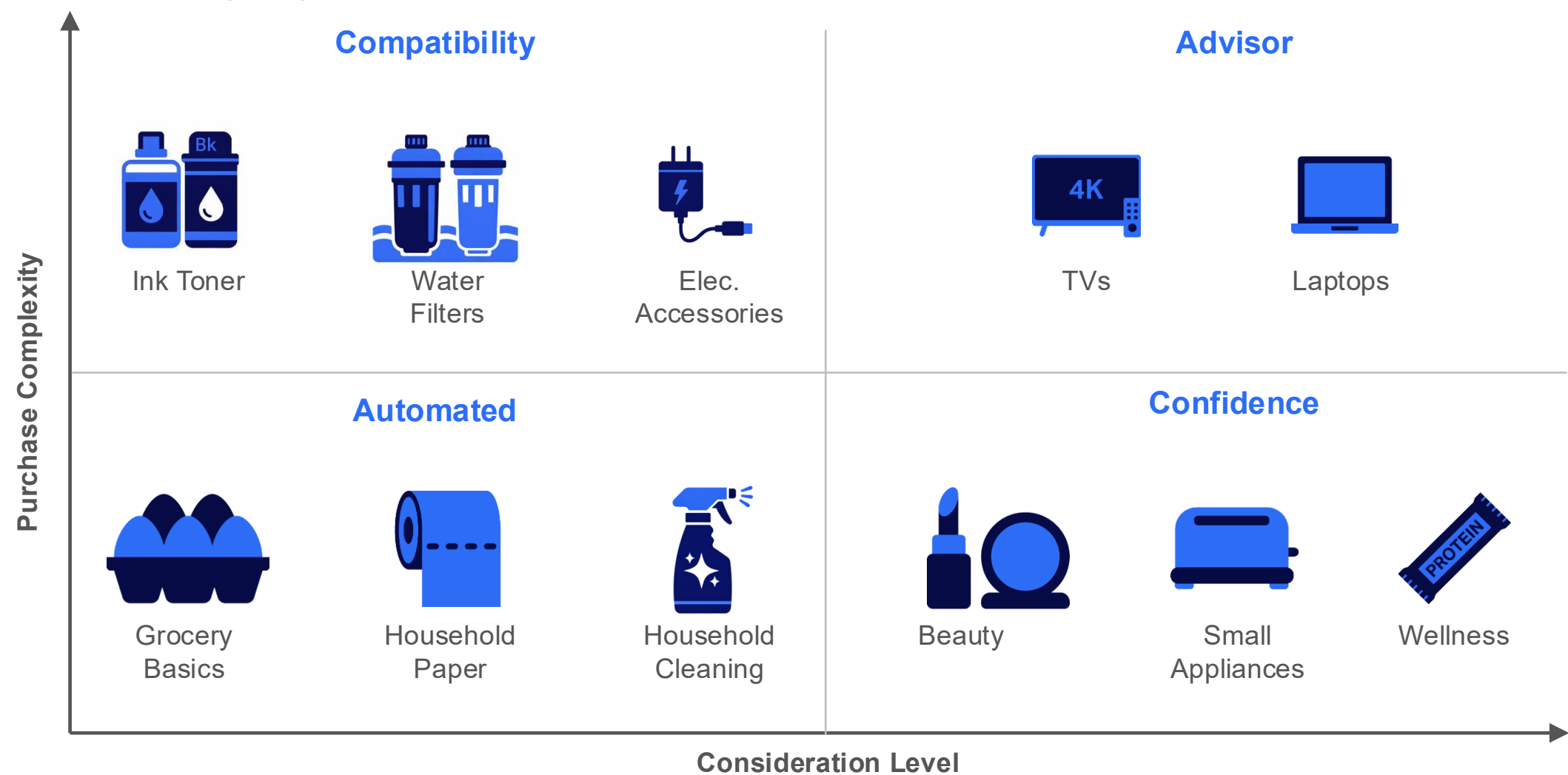
A new, even more challenging competitive environment



Source: NIQ Digital Shelf

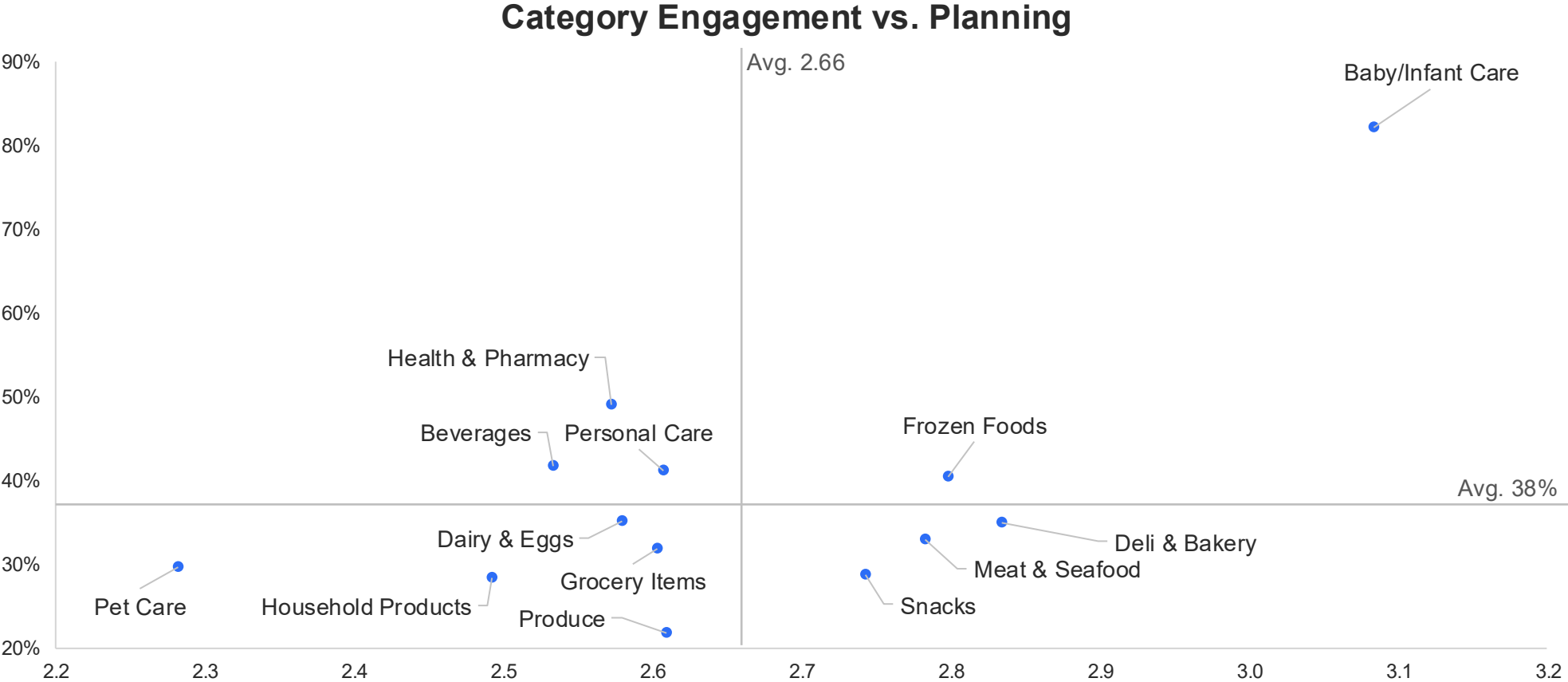
# Develop frameworks to determine which categories and missions will be affected by AI first and in what ways

## The Role AI May Play



# Work to quantify where AI will impact most meaningfully

*Did any of the following influence you prior to the purchase of this product? (Sum % of respondents for Search Engine, Reviews, and Website Recommendation)*



*Describe how you purchased this product using a range of 1-5, 1: I went straight for the specific product I knew I wanted, 5: I spent time browsing different options*

Source: NIQ Category Shopper Fundamentals, Fall 2025

# Bring perspective on the future of discovery for your categories to retailer joint business planning

 Selected Search Unbranded Keywords and Potential AI Queries

## Digital Shelf Keywords

- paper towel
- toilet paper rolls
- trash bags
- beef hot dogs
- paper plates
- organic ketchup
- protein bars
- red wine
- exercise towel
- fresh blueberries

## Focused AI Queries

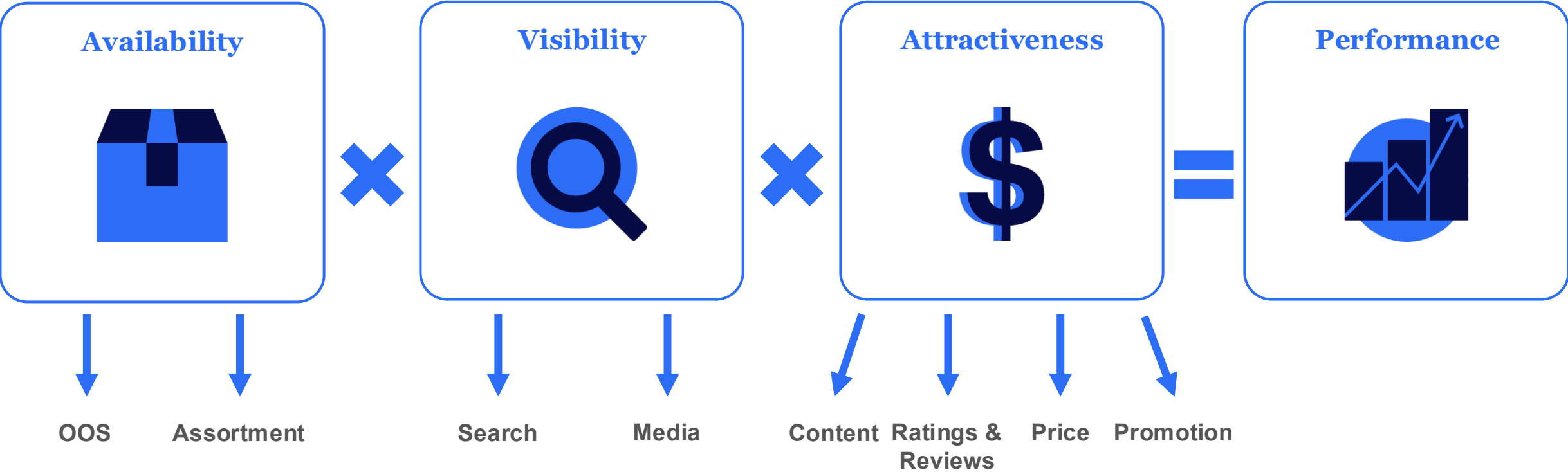
- What paper towels are best for cleaning stainless steel?
- Which toilet paper lasts the longest per roll?
- What trash bags are rated strongest?
- What is the best July 4<sup>th</sup> food?
- Find me July 4<sup>th</sup> themed paper plates.
- What condiments do I need for a BBQ?
- Best grab and go lunches for working moms
- Housewarming gifts for close friends
- What do I need to bring to my first Pilates class?
- What healthy snacks do 3<sup>rd</sup> graders like?

## Holistic AI Queries

- I'm moving into a new home; can you create a full essentials shopping list for me to stock the pantry and bathrooms?
- We are planning a July 4<sup>th</sup> BBQ, help me get everything I need and plan the menu.
- Look at my calendar for this week, what do I need to shop for this Sunday?

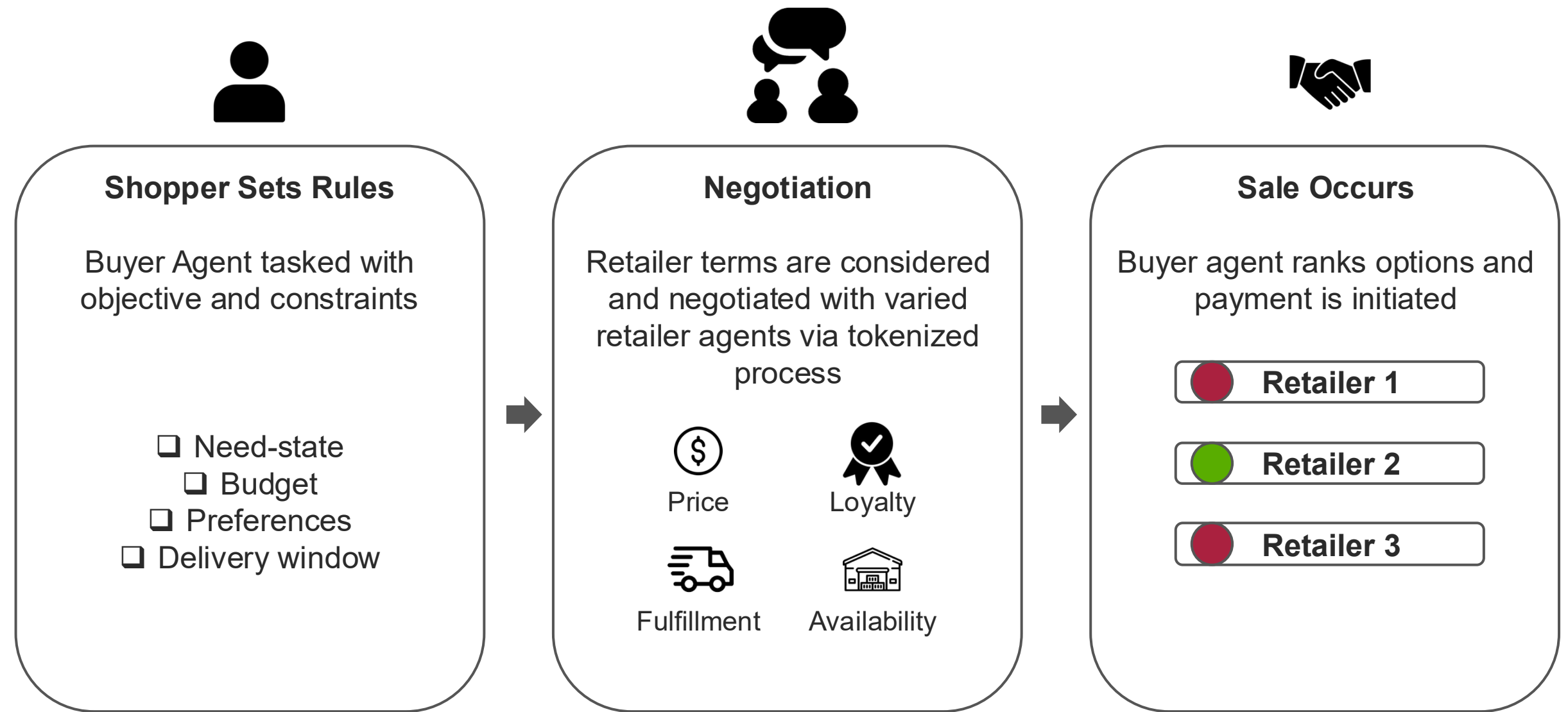
Source: NIQ Digital Shelf

Digital Shelf fundamentals remain the key focus for the future of this space, understand which levers are critical now and which will be in the future



Source: NIQ

# What's possible next? A2A or agent to agent negotiation for checkout

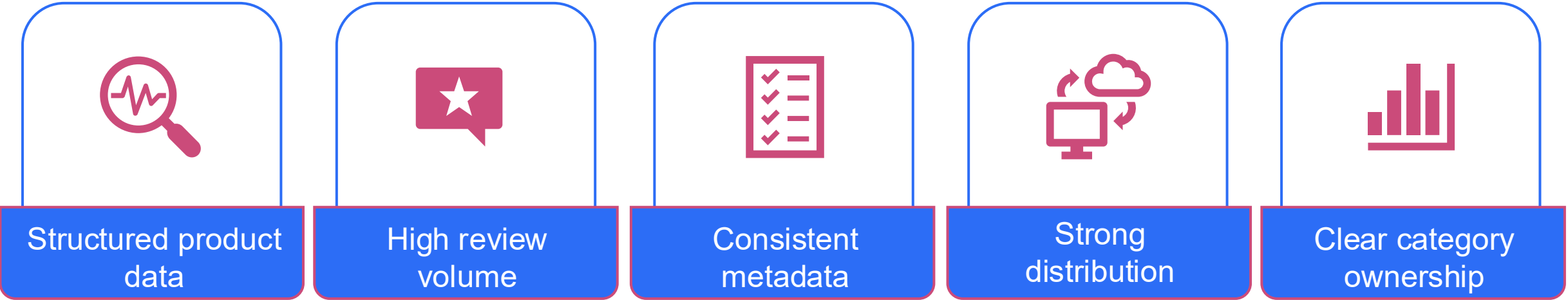


Source: NIQ

# The New Winning Formula

NIQ Brandbank

*The proven formula for winning in digital commerce*



# What Brands Must Do



*Fix product data everywhere*

*Optimize retailer PDPs*

*Guide better reviews*

*Publish comparison-ready content*

*Act like data companies, not marketers*



Ensure complete, consistent data across all channels.

Turn PDPs into high-performing conversion drivers.

Drive quality reviews and improve continuously.

Standardize data for easy comparison.

Use data to optimize, not guess.

Source: NIQ

# Thank you!

## NielsenIQ

