



EARLY ACCESS DRAFT • PUBLIC RELEASE OCT 20, 2026

The State of Agentic Commerce

AI is writing the shopping shortlist. Who's on it?

3,755

AI shopping answers analyzed

18%

of questions where four AI assistants
named the same brand first

1 in 4

US online holiday shoppers plan to
begin in an AI tool

Contents

01	Executive summary	3
	The report in one page	
02	At a glance	4
	Eight numbers that define the market	
03	The shift	5
	Shoppers, traffic and platforms have already moved to AI	
04	What AI recommends	7
	Inside 3,755 AI shopping answers	
05	Where AI gets its answers	9
	The sites behind every recommendation	
06	Category by category	10
	Where one brand dominates, and where the field is open	
07	The platform landscape	11
	Checkout, ads and payments inside AI assistants	
08	Agent lab	12
	How AI shoppers choose, and why the rules keep moving	
09	Agent readiness	13
	Can an AI shop your store? A 119-store check	
10	What to do now	14
	Five moves for the next quarter	
11	Method and sources	15
	How we measured, and where the numbers come from	



Executive summary

Shopping now starts with a question to an AI. The answer is a shortlist of a few brands, and most brands can't see whether they're on it.

SHOPPING STARTS IN AI

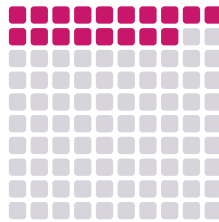


1 in 4

US online holiday shoppers plan to begin in an AI tool

Up from 17% last year (Bain)

AI CAN'T AGREE WHO TO RECOMMEND

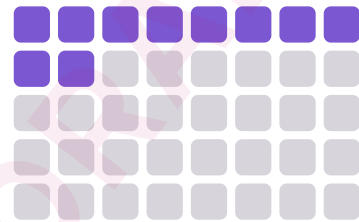


18 in 100

questions where four AI assistants named the same brand first

503 questions all four answered with a brand

MANY BRANDS AREN'T ON IT



10 of 40

searches where the brand we tracked was never named

Qore scan

About 132 million US adults have already bought something with AI's help, and shoppers who arrive from AI convert 60% better than other visitors. Yet the four leading assistants rarely agree on what to recommend. In some product searches one brand appears in almost every answer; in others no brand reaches 20%.

Each assistant draws on different sources. Gemini cites Reddit and YouTube in a third of its sourced answers; ChatGPT almost never does, and leans on brands' own websites. Both cite Walmart and Target, which let AI bots in, and almost never Amazon, which opts out. Amazon's block doesn't reach everywhere: Claude's searches still returned Amazon pages in more than half its shopping answers. Stores are only partly ready: almost every store lets AI bots in, but only a third publish return and shipping terms an AI can read.

Brands that win will treat AI visibility as a channel they measure and manage: track Agentic Rank on every assistant, answer the specific questions shoppers ask, and make products and policies readable by machines.



At a glance

132M



US adults, about half, have bought something with AI's help

Survey • PYMNTS, Sept 2026

1 in 4



US online holiday shoppers plan to begin in an AI tool, up from 17%

Survey • Bain, Sept 2026

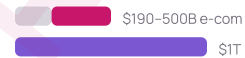
+60%



higher conversion for AI-referred shoppers than other visitors

Measured • Adobe, Jul 2026

\$1T



US retail revenue AI agents could orchestrate by 2030, the top of the forecast range

Projected • McKinsey

18%



of questions where four AI assistants named the same brand first

Qore scan • 503 questions

10 of 40



searches where the brand we tracked was never named by any assistant

Qore scan

34%



of Gemini's sourced answers cite Reddit. ChatGPT's: 0.3%

Qore scan • 832 sourced answers

1 in 3



stores publish return and shipping terms an AI can read

Qore check • 84 testable stores



03 • THE SHIFT

AI is where shopping starts

Shoppers, traffic and platforms have already moved.

Research that used to happen across search results, reviews and marketplaces now happens in a conversation. Shoppers describe a need, the assistant compares the options, and a short list of brands comes back.

42%

of US consumers have used AI to shop. Gen Z: 57%

Survey • Adobe, Jul 2026

59%

of US consumers say AI showed them brands they didn't know

Survey • RTB House, Aug 2026

18 mo

for AI shopping to pass 50% of Europeans. E-commerce took about 5 years

Survey • Deloitte, Aug 2026

Traffic follows, and it converts

+693%

AI traffic to US retail sites, holiday 2025 vs 2024

Measured • Adobe

+130%

forecast AI traffic growth, holiday 2026

Projected • Adobe, Sept 2026

+60%

conversion for AI-referred visits vs other traffic

Measured • Adobe, Jul 2026

The platforms are at mass scale

1B+

ChatGPT weekly users

Platform • OpenAI

1B+

Gemini app monthly users

Platform • Google

2.5B

Google AI Overviews monthly users

Platform • Google

350M+

Amazon Alexa for Shopping customers

Platform • Amazon



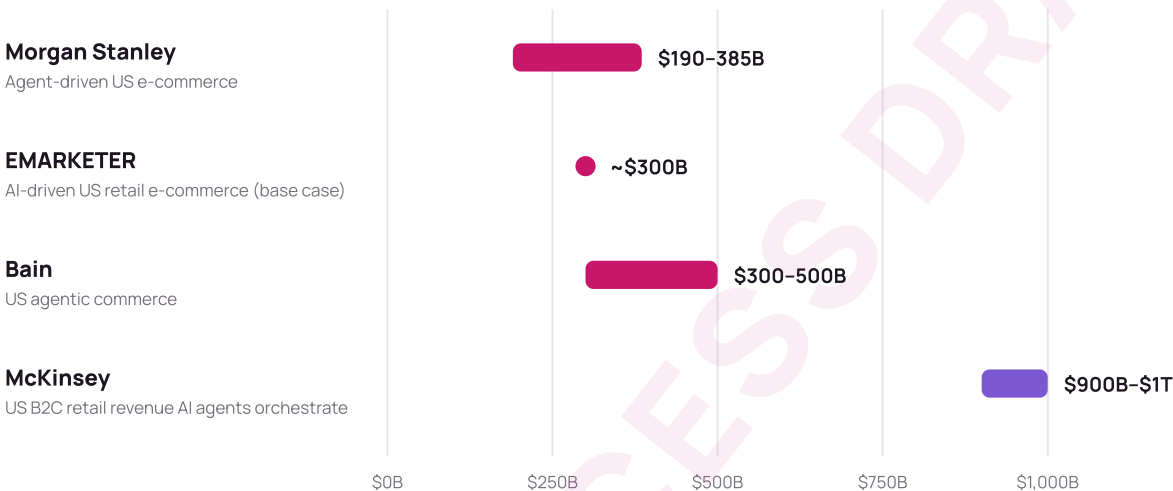
03 • THE SHIFT

A market heading for hundreds of billions

Forecasters agree on the direction and differ on the definition. Counting sales that agents drive, US estimates for 2030 run from \$190 billion to \$500 billion. Counting every purchase AI orchestrates, McKinsey reaches \$1 trillion.

Figure 1. Forecasts for AI-driven US commerce in 2030

Each firm measures something different, so ranges are shown side by side, not added.



Sources: Morgan Stanley (Dec 2025); EMARKETER (Sept 2026), base case; Bain (Dec 2025); McKinsey (Oct 2025), includes AI-influenced purchases. All projected.

\$262B

of 2025 holiday retail sales worldwide were influenced by AI and agents: 20% of the total

Platform • Salesforce

~\$12B

in 2025 sales Amazon attributes to its Rufus assistant

Platform • Amazon

89%

of UK and US merchants are preparing for agentic commerce

Survey • Checkout.com

Why the range is wide. Some forecasts count only purchases an agent completes. Others count every purchase an AI influences, in stores as well as online.

What they agree on. Every forecast points up, and the fastest-growing part is the research and shortlisting that happens before anyone clicks buy.



The AI shortlist is inconsistent

3,755 answers from ChatGPT, Claude, Gemini and Perplexity to real shopping questions, across 11 categories.

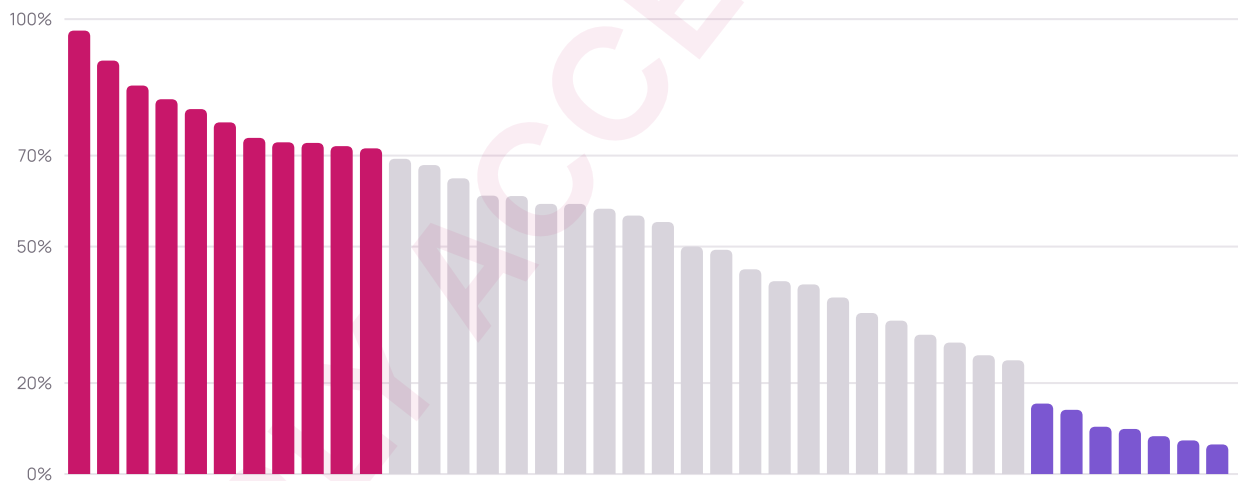
18%

of the 503 questions all four answered with a brand, ChatGPT, Claude, Gemini and Perplexity named the **same brand first**. Any two assistants agreed about a third of the time.

Figure 2. How often the leading brand is named, by product search

Share of each search's AI answers that name its most-mentioned brand.

■ Dominated: leading brand in 70%+ of answers (11) ■ 20–69% (22) ■ Wide open: no brand above 20% (7)



Source: Qore scan of 3,755 AI answers (ChatGPT, Claude, Gemini, Perplexity via API), September 2026. Four of the seven wide-open searches are health searches, where assistants often named ingredients or medicines instead of brands.

Why assistants disagree. Each one searches the web differently, weighs different sources and updates on its own schedule. Winning one assistant says little about the others.

Why it matters. A shopper using ChatGPT and a shopper using Gemini can see different shortlists for the same question. Visibility has to be measured per assistant.



04 • WHAT AI RECOMMENDS

Long lists, crowded tops, missing brands

10 of 40

searches where the brand we tracked was never named by any of the four assistants

Qore scan

58

brands named in the median product search

Qore scan

35%

of all brand mentions go to the top 3 brands in a search

Qore scan

AI shortlists are long in total but crowded at the top. A search can surface dozens of brands across many answers, yet three of them take a third of the mentions. The rest compete for the remainder, often in answers to very specific questions.

HEALTH & SUPPLEMENTS

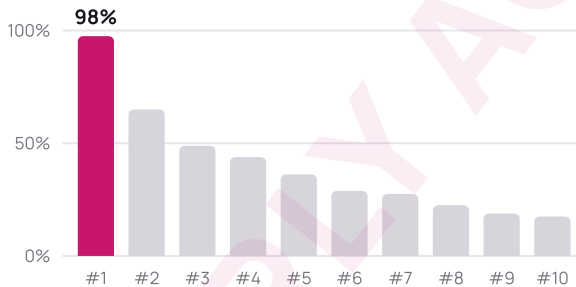
AI names ingredients, not brands. Only 34% of supplement answers named any brand, against 93% in consumer electronics. The assistants recommended ingredients such as psyllium or green tea extract instead. Supplement brands compete for a third of the answers, so the way in is to be the brand AI connects to the ingredient and the evidence.

Figure 3. Two shapes of AI shortlist

In a dominated search one brand is in almost every answer. In an open search the lead is small and the list is long.

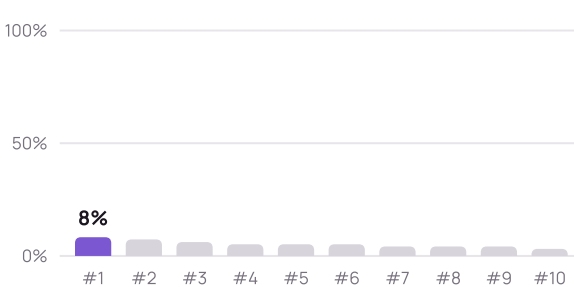
A dominated search

66 brands named in total



An open search

141 brands named in total



Share of AI answers naming each of the top 10 brands. Two real searches from our sample; brand names withheld.

Source: Qore scan, September 2026.

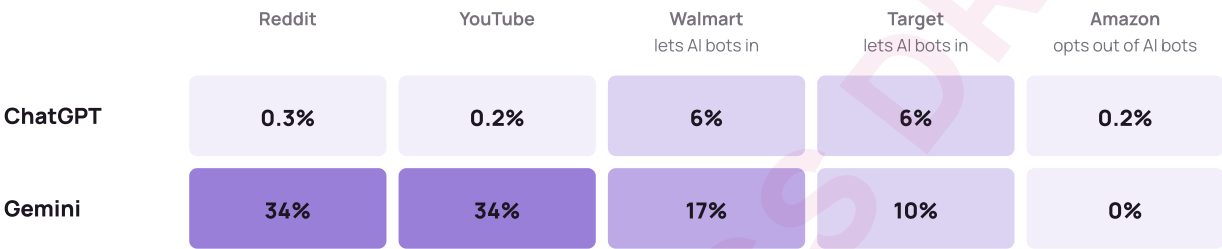


Each assistant shops in a different place

The sources behind an answer decide which brands make the list.

Figure 4. Where ChatGPT’s and Gemini’s shopping answers come from

Share of each assistant’s sourced answers that cite the site.



Source: Qore scan, September 2026. 608 sourced ChatGPT answers, 224 sourced Gemini answers (API). Amazon’s robots.txt opts out of OpenAI’s search bots and Google-Extended, which governs Gemini’s use of pages. Claude is not in this chart: our logs record every page its searches returned, not the pages it cited, so its figures are reported separately. Perplexity’s sources were not captured.

51%

of ChatGPT’s citations point to brands’ own websites. Gemini’s: 30%

Qore scan

54%

of Claude’s shopping answers came from web searches that returned Amazon pages, though Amazon blocks Claude’s search bot

Qore scan • 566 answers

5.4%

of sources shared by ChatGPT and Gemini on the same product question

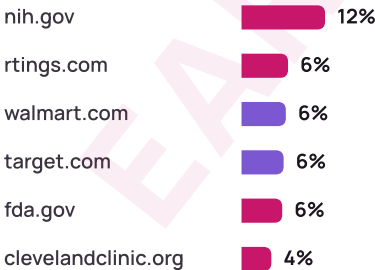
Measured • arXiv preprint, Sept 2026

Figure 5. Each assistant’s most-cited websites

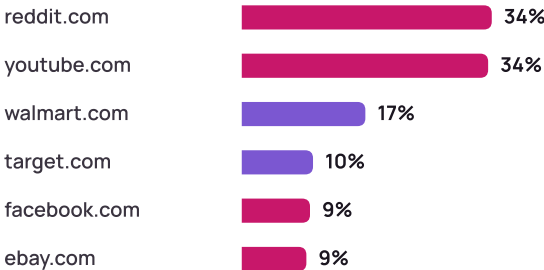
Share of sourced answers citing each site. Brands’ own websites not shown.

■ Retailers that let AI bots in ■ Other sites

ChatGPT



Gemini



Source: Qore scan, September 2026. 608 sourced ChatGPT answers, 224 sourced Gemini answers.



06 • CATEGORY BY CATEGORY

Every category plays by different rules

How often AI names a brand, and how concentrated the shortlist is.

Figure 6. The AI shortlist by category

Reported by category only. Brand names withheld.

Category	Searches	Answers that name a brand	Leading brand named in (median)	Top 3 brands' share of mentions
Consumer electronics	5	93%	74%	47%
Sports & outdoorst	1	88%	49%	21%
Apparel & footwear	7	84%	58%	27%
Home & furniture	4	83%	58%	34%
Food & beverage	3	82%	69%	30%
Beauty & personal care	3	80%	35%	35%
Pet products	4	75%	42%	33%
Household essentials†	2	74%	48%	40%
Kitchen & appliances†	2	68%	34%	41%
Toys & gamest	1	67%	31%	33%
Health & supplements	8	43%	26%	35%
Baby & maternity	0	Not in this edition's sample		

Source: Qore scan, September 2026. † 1-2 product searches: read as directional.

4 of 5

consumer electronics searches are dominated by one brand

Qore scan

27%

top-3 share in apparel, the least concentrated category

Qore scan

+312%

AI referral growth in beauty, the fastest of any industry (from a small base)

Measured • Similarweb, May 2026



07 • THE PLATFORM LANDSCAPE

The platforms are building the rails

Every major assistant and marketplace now supports shopping inside the conversation.

Assistant	Buy inside the assistant	Ads	Scale
ChatGPT	Checkout hands off to merchant sites	Yes. \$1B run rate in under 200 days	1B+ weekly users
Google AI Mode & Gemini	Yes (US). On by default for eligible Shopify stores	Yes, alongside AI Overviews	1B+ monthly users each
Microsoft Copilot	Yes (US)	Yes	500K+ merchants in catalog
Perplexity	Yes (US), with PayPal	No	—
Meta Muse	Yes (US). On by default for eligible Shopify stores	Not in Muse	Meta AI: 1B+ monthly users
Amazon Alexa for Shopping	Yes, Amazon's catalog	Sponsored prompts; brand chat ads announced	350M+ customers
Walmart Sparky	Yes, Walmart's catalog	—	Users up 70% YoY

Sources: company announcements and filings, 2025–2026; Shopify Help Center. As of September 2026.

New checkout protocols. Google's Universal Commerce Protocol (UCP) and OpenAI and Stripe's Agentic Commerce Protocol (ACP) let agents complete purchases. UCP's tech council includes Amazon, Meta, Microsoft, Salesforce, Stripe, Google, Shopify, Etsy, Target and Wayfair.

Payments are ready. Visa, Mastercard, PayPal and Stripe all offer payment products built for AI agents. Agentic purchases through Stripe's Link wallet grew 38x in one month.

\$32B→\$68B

US AI ad spend, 2026 to 2030

Projected • EMARKETER

250M

people have had a first AI shopping experience in Alibaba's Qwen app

Platform • Alibaba

\$1.8B

valuation of AI-visibility platform Profound after a \$180M raise

Platform • Profound, Sept 2026



How AI shoppers choose

Agents weigh signals differently from people, and the rules keep moving.

01

Model updates reshuffle the shelf

In a lab test, one product's share of AI picks went from **45% to 77%** after a model update, and the page slot GPT-4.1 liked best was the one GPT-5.1 liked least.

Live AI search moves too. One ChatGPT update in July 2026 shifted shopping answers to merchant feeds overnight, and the top 10 merchants' share of offers rose from **22.5% to 41.8%**. The sources behind shopping answers change about **40% a week**.

Allouah et al., arXiv 2508.02630 (Lab) • Profound, Sept 2026 • BrightEdge, 2026

02

Placement wins on marketplaces

On a mock store page laid out like Amazon's results, moving a product from the bottom row to the top made Claude **5x** more likely to pick it. A "Sponsored" tag cost little (10% to about 8%); an "Overall Pick" badge lifted picks up to **43%**.

Allouah et al., arXiv 2508.02630

03

Ratings matter more to agents

A higher star rating moved agents' choices by **30-80 points** in 14 of 17 models, against about 5 for people.

Cherep et al., MIT, arXiv 2509.25609

04

Product copy isn't set-and-forget

AI rewrites of product descriptions won a significant share gain in **a third** of tests, averaging about **+15 points** on GPT-5.1. What works on one model can fail on the next.

Allouah et al., arXiv 2508.02630

05

Pages AI reads decide the answer

AI answers are built from the few top pages it reads. When researchers edited those **three pages** to recommend a made-up brand, the AI named it up to **74%** of the time. Being on those pages gets a brand named.

Luo & Chen, arXiv 2606.13610

Lab results: preprints, 2025–2026. Cards 02 and 04 used a simulated marketplace page an agent browses, not ads inside ChatGPT or Gemini answers. Live figures: Profound; BrightEdge.

The takeaway: agents reward clear, machine-readable facts, and the rules change every week. A single check is a snapshot; Agentic Rank has to be tracked continuously.

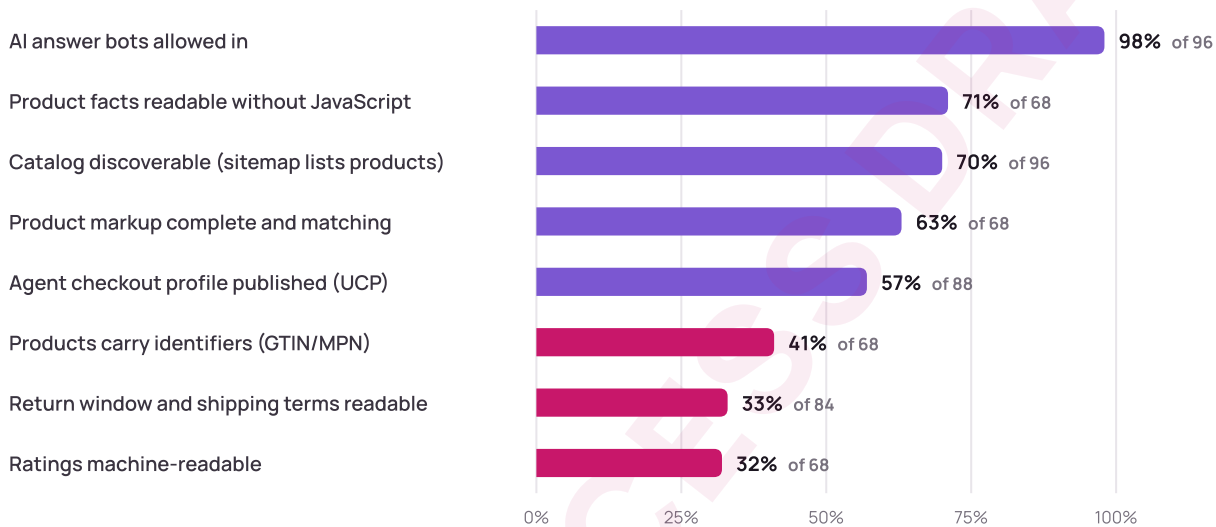


Can AI shop your store?

We checked 119 online stores on eight things an AI shopping agent needs.

Figure 7. Share of stores passing each check

71 DTC brands, 27 established brands, 21 retailers. Each bar shows the stores we could test; stores that blocked our bot are excluded, not failed.



Source: Qore agent-readiness check, 119 stores, September 2026. Public pages only, no JavaScript, declared bot.

85%

of Shopify stores publish an agent-checkout profile, against 3 of 33 other stores we could test

Qore check

5 of 8

checks passed by the median store

Qore check

77%

of stores' built-in AI assistants gave no concrete return window when asked

Qore check

Platforms do the heavy lifting. Shopify publishes an agent-checkout (UCP) profile for its stores by default. Big retailers such as Walmart and Target sell inside AI assistants through direct partnerships, which a public check can't see.

Big brands turn bots away. 48% of established brands and 38% of retailers refused our declared bot outright, against 10% of DTC brands. That blocks bad bots, and can block real AI shoppers too.



Five moves for the next quarter

1 Measure your Agentic Rank on every assistant, every month

Four assistants agree on the top brand only 18% of the time, and one model update can reshuffle a category overnight.

2 Answer the specific questions shoppers ask

Open searches and needs-based questions are where challengers win places on the shortlist.

3 Be where each assistant looks

Retailer listings, Reddit and YouTube, review sites and your own website. Each assistant weighs them differently.

4 Make your store readable by machines

Product identifiers, machine-readable ratings, and return and shipping terms an agent can read.

5 Treat ads and rank as separate channels

ChatGPT ads now run at a \$1B pace. Ads buy placement next to the answer; rank decides what's in it.

See where your brand stands

Qore measures your Agentic Rank across ChatGPT, Claude, Gemini and Perplexity, shows which sources shape each answer, and checks your store's agent readiness.

Check your Agentic Rank

gotrellis.com/qore/meet-qore



Method

AI answer scan

40 product searches in 11 categories (none yet in Baby & maternity). For each, about 24 unbranded shopper questions were sent to ChatGPT (gpt-5-2025-08-07), Claude (claude-sonnet-5), Gemini (gemini-3.8-flash) and Perplexity (sonar) through their APIs, with web search on, once each, between Sept 18 and 27, 2026: 3,755 answers in total.

Agreement compares the first brand each assistant named, on the 503 questions where all four named one. Source analysis covers ChatGPT and Gemini: Claude's logs record every page its searches returned rather than the pages it cited, and Perplexity's sources weren't captured. Brand names were cleaned so product lines count toward their parent brand and ingredients are not counted as brands. The searches come from Qore's brand work; they are not a random sample. Results describe API answers, which can differ from the consumer apps.

Agent-readiness check

119 US-facing online stores checked on Sept 29, 2026 on eight public signals. Public pages only, read without JavaScript, by a declared bot that obeys robots.txt and requests at most one page per second. Checks that couldn't be run, including at stores that blocked our bot, count as not testable, not failed.

Third-party data

Every external figure was checked against its original source. Forecasts are shown with their definitions and are never added together. Each figure carries one of five labels:

- MEASURED** counted behavior
- PLATFORM** a company's own figure
- SURVEY** what people say
- PROJECTED** a forecast
- LAB TEST** a controlled experiment

Selected sources

- Adobe, AI Traffic Trends Report (Aug 2026); holiday 2025 and 2026 releases; Prime Day 2026
- Alphabet Q2 2026 earnings; Google, Gemini app passes 1B monthly users (Aug 2026)
- Amazon Q4 2025 and Q2 2026 earnings releases
- Bain, 2030 forecast (Dec 2025); 2026 Holiday Shopping Outlook (Sept 2026)
- Checkout.com, Agentic Commerce report (Jun 2026)
- Deloitte, The state of Agentic Commerce in Europe (Aug 2026)
- EMARKETER, AI-driven retail e-commerce forecast (Sept 2026); US AI ad spend forecast (Jun 2026)
- McKinsey, The agentic commerce opportunity (Oct 2025)
- Morgan Stanley, Agentic commerce market impact outlook (Dec 2025)
- OpenAI, ChatGPT ads announcement (Aug 2026)
- PYMNTS Intelligence, Will the 2026 shopping season go agentic? (Sept 2026)
- RTB House consumer survey (Aug 2026); Salesforce holiday 2025 data (Jan 2026)
- Similarweb, AI referral traffic by industry (2026); Stripe, Link for agents (Sept 2026)
- Allouah et al., arXiv 2508.02630; Cherep et al., arXiv 2509.25609; Luo & Chen, arXiv 2606.13610; arXiv 2609.18729





Qore by Trellis measures how brands show up in AI shopping answers, from Agentic Rank to the sources behind each answer, and runs the work to improve it across Amazon, Walmart, Google and TikTok.

Check your Agentic Rank at gotrellis.com/qore/meet-qore

Questions, or a free Agentic Rank check for your brand: dan@gotrellis.com