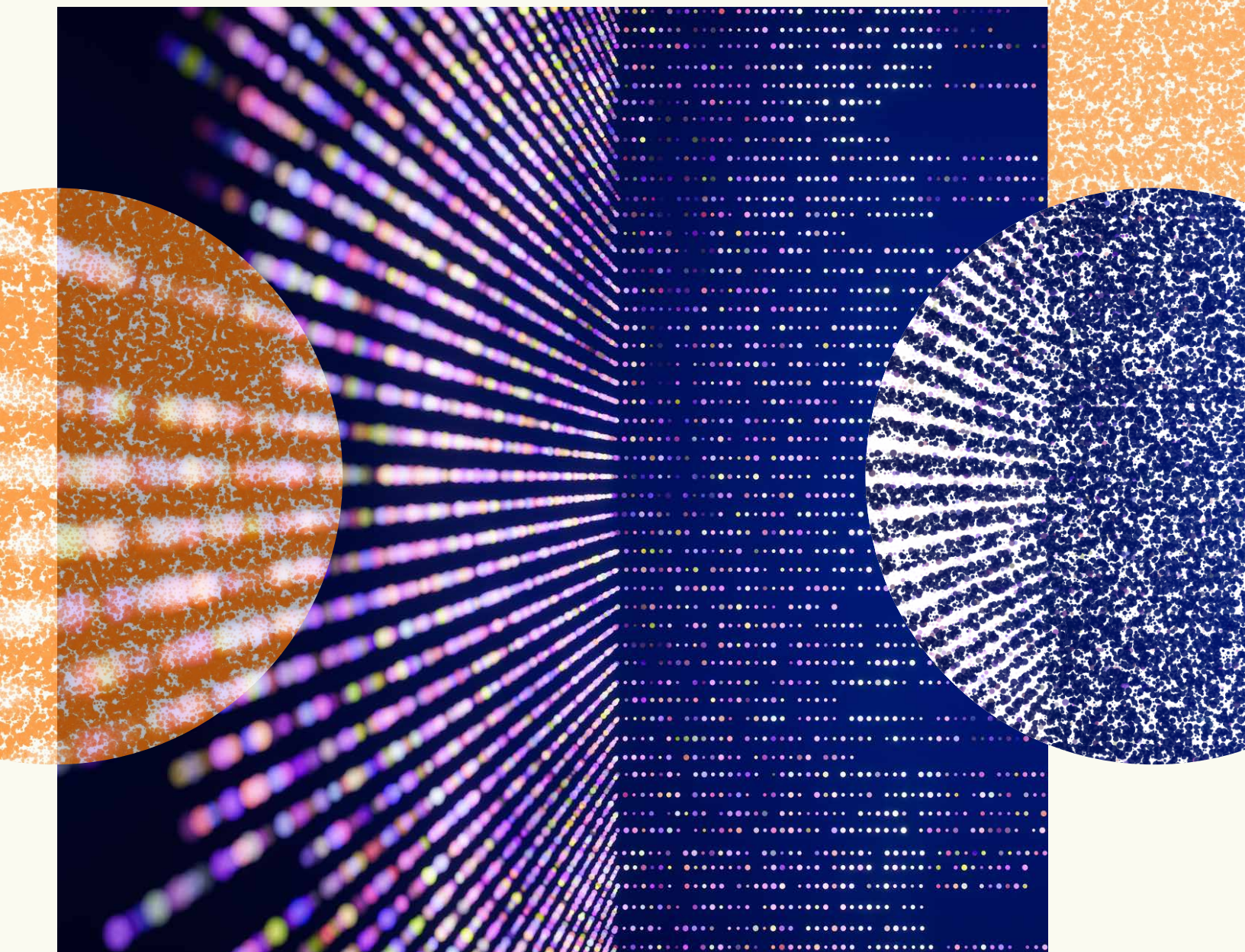


WHY THE NEXT ERA OF COMMERCE IS WON BEFORE THE CONSUMER EVER SHOWS UP



INTRODUCTION

There is a new shelf in commerce. You cannot see it. Your consumer cannot see it. There is no UI to optimize, no search bar to win, no shelf placement to negotiate. There is only a question an AI agent asks on behalf of a consumer and an answer that either includes your brand or does not.

We call it the Invisible Shelf. And for most brands, it is already deciding their future.

The conversation about AI in commerce has been dominated by defensive framing: brands at risk of losing discovery, margins under threat from platform fees, customer relationships being disintermediated by LLMs. That framing is not wrong. But it is incomplete. The brands that will win the Invisible Shelf are not the ones managing the risk. They are the ones who understand that technical readiness is a prerequisite but you cannot engineer your way in. You have to earn your way in. And that makes it the most consequential brand-building challenge of this decade.

This guide sets out to make the Invisible Shelf visible: to explain how AI agents are reshaping discovery, consideration, and selection; why brand equity and machine-readable readiness must now work together; and what brands need to do today to build advantage before agentic commerce becomes the default. It is written for brand, commerce, marketing, digital, and retail leaders responsible for growth — especially those navigating how to make their brands more discoverable, more relevant, and more chosen in AI-mediated environments.



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WHY THE FUNNEL BREAKS

The traditional consumer journey assumed a human making decisions at every stage: Discover. Consider. Purchase. Repeat. Brands invested accordingly: building websites, optimizing search, crafting PDPs, training retail teams. The consumer was always present. The brand had a chance to show up at every step.

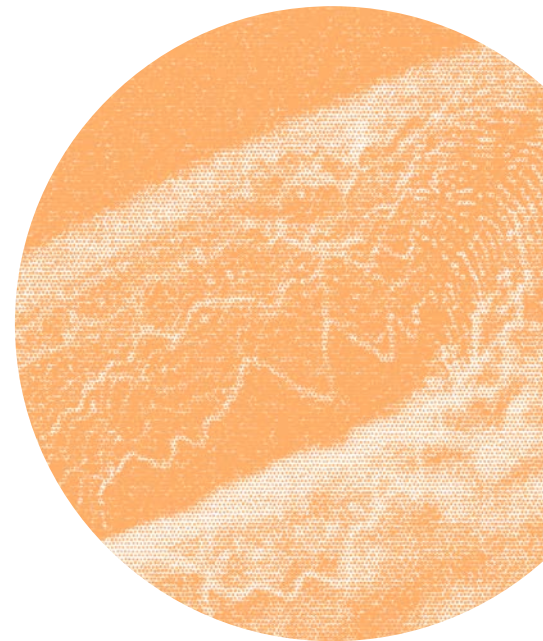
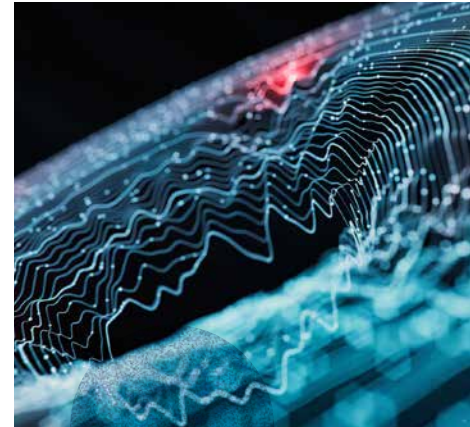
AI agents break that assumption entirely. The agent does not travel the funnel in a straight line. It oscillates. It disappears at the moments that used to be visible and shows up at the moments that used to be invisible. Discovery, which was once a conscious consumer behavior, happens silently inside an agent that already knows what someone needs. Purchase, once a visible transaction, is now embedded within the decision layer — increasingly executed in a frictionless way as the consequence of a question asked or a recommendation made, rather than as a discrete step.

But the agent does show up visibly at two critical moments. At consideration, the agent surfaces its reasoning, enriching the moment with context: why this product, why now, why for this occasion. And at loyalty, the agent surprises and delights, connecting a brand to a life moment rather than merely reordering a product.

- THE AGENT DISAPPEARS AT THE MOMENTS BRANDS USED TO DOMINATE. IT SHOWS UP AT THE MOMENTS BRANDS USED TO IGNORE.

This has profound implications for how brands should invest. The moments where agents act invisibly — discovery and purchase — are won through infrastructure: clean product data, machine-readable attributes, availability signals, frictionless fulfillment. Every serious brand will eventually get this right. While the infrastructure is necessary, it is not differentiating.

The moments where agents show up visibly — consideration and loyalty — are won through creative and cultural equity: occasion intelligence, emotional context, the brand's ability to make an agent understand not just what the product is but why it belongs in this specific life moment. This is where the durable advantage lives. Infrastructure can be copied. Brand and cultural equity cannot.



THE TWO JOBS HAVE NOT CHANGED. HOW YOU DO THEM HAS.

Marketing has always had two fundamental jobs:

- 1. Build the demand that makes consumers want your brand before they are in a buying moment.
- 2. Win the selection when that moment arrives.

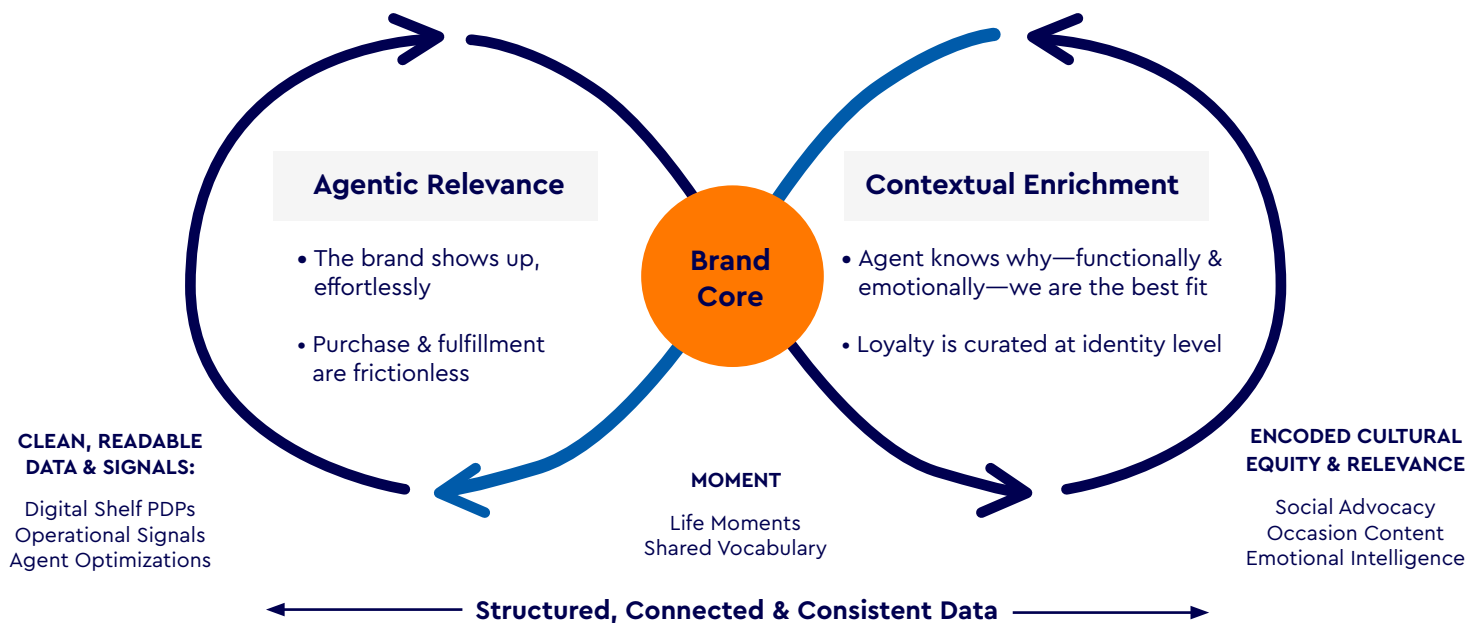
Those two jobs have not changed in the agentic era. What has changed is where and how each job gets done.

Building demand in an agentic world means encoding your brand equity into the agent's reasoning before the instruction is ever given. When a consumer tells an agent to order dinner supplies for a holiday gathering, they should not need to say your brand name. If you have done the work, the agent already associates your brand with that occasion, that identity, that emotional territory. The instruction is generic. The selection is not. That is brand demand, expressed as machine logic.

Winning selection in an agentic world means being found, retrieved, and chosen at the moment an agent is making a decision on a consumer's behalf. This requires structured product data, semantic enrichment, and generative engine optimization (GEO): the discipline of making your brand legible, citable, and contextually relevant to the models that arbitrate discovery.

- BUILD DEMAND SO THE INSTRUCTION INCLUDES YOU.
WIN SELECTION SO THE ALGORITHM CHOOSES YOU.

Most brands are currently focused entirely on the second job, optimizing for selection in AI interfaces. That is necessary. But without the first job, the only brands that earn generic instructions are the ones with moment, occasion, context and meaning baked in. The commodity brands that skip moment and context encoding will find themselves perpetually fighting for visibility in systems that do not select them, with an ever-rising cost to be found.



THE BRAND DATA CORE: WHERE BOTH JOBS CONNECT

At the center of the bowtie model is what we call the Brand Data Core. It is the pinch point where efficiency and enrichment meet, and it is the infrastructure investment that makes both jobs possible simultaneously.

The Brand Data Core has several components:

- **1. Product Truth Layer**

Variant clarity, pack-size precision, availability signals, structured attributes. The data that lets agents execute invisibly, without substituting a competitor because your inventory signal was ambiguous.

- **2. Occasion Vocabulary**

A controlled taxonomy of brand moments, used consistently across every asset. This provides the "semantic scaffolding" that allows agents to reliably surface your brands for the right occasions.

- **3. Moment Card Schema**

Machine-readable formats that map occasions, emotional intent, identity signals, and constraint logic. Not just what the product is, but who uses it, when, why, and under what circumstances.

- **4. Cultural Equity as Data**

The brand's earned emotional associations, encoded as reasoning inputs. A brand with a century of cultural equity has a structural advantage on the Invisible Shelf, but only if that equity is expressed as machine-readable intelligence.

This last point deserves emphasis. The brands that will dominate agentic commerce are not the ones with the best technology. They are the ones with the deepest brand equity, structured in a way an agent can reason about. That is a creative and strategic advantage masquerading as a data problem.

WHERE MOST BRANDS ACTUALLY ARE

Understanding the Invisible Shelf is one thing. Knowing where your brand stands relative to it is another. Based on our work across hundreds of brands, we see four stages of agentic commerce maturity:

Stage 1 Invisible	Stage 2 Machine Readable	Stage 3 AI Activated	Stage 4 Anticipatory
Products not structured for AI visibility. Unstructured data, ad hoc taxonomy.	Rich product data, clean taxonomy, basic API connections. Agents can find you.	AI-enhanced data, dynamic optimization, agents acting as personal shoppers.	Predictive attribute management, self-improving systems, cultural equity as machine-readable data.
<i>Most brands today.</i>	<i>The minimum to survive.</i>	<i>Where leaders are heading.</i>	<i>The defensible moat.</i>

Most brands today are at Stage 1 or early Stage 2. Their products are either invisible to AI systems or minimally structured, dependent on traditional SEO alone. The good news: the gap to Stage 2 is an infrastructure problem with a defined solution. The gap from Stage 2 to Stage 4 is a strategy and creativity problem. And that is where the durable competitive advantage lives.



FIVE MOVES FOR COMMERCE LEADERS

You do not need to solve everything at once. The brands that will win the Invisible Shelf in the next three years are the ones taking deliberate steps today. Here are the moves that matter most:



- **1. Audit your AI visibility now.** (Share of Recommendation) Understand where and how your brand appears across major generative search interfaces: ChatGPT, Gemini, Perplexity, Amazon Rufus, Walmart Sparky. Look at your citation rank and your citation sources, and the types of topics/moments/queries you're associated with. Develop an understanding of the dataset for each model and citation sources. Expect that your results will vary by model. You cannot manage what you have not measured. Establish a baseline today.
- **2. Build your Brand Data Core.** Start with clean, complete product data: standardized titles, consistent attribute naming, and accurate categorization across every SKU. Make sure your data is parsable and machine readable — so agents can match your products to how shoppers actually phrase their needs. Without this baseline, no amount of creative investment in occasion intelligence or brand positioning will reach the agent making the consideration and selection decision.
- **3. Develop your occasion vocabulary.** Map a few core moments where your brand has earned the right to be chosen. Encode those moments and their variants as structured intelligence, not just campaign themes. This is the creative work that compounds over time.
- **4. Invest in GEO alongside SEO.** Generative engine optimization requires a different discipline than traditional search optimization. Structure digital assets for inclusion and citation in generative responses. Test what content formats and data structures earn recommendation across different agent platforms.
- **5. Pilot AI-mediated commerce journeys with data terms you control.** The brands that will understand agentic commerce are the ones experimenting with it now. But negotiate your data terms carefully. The behavioral and intent data generated by these interactions is your first-party asset. Do not cede it entirely to platform intermediaries.



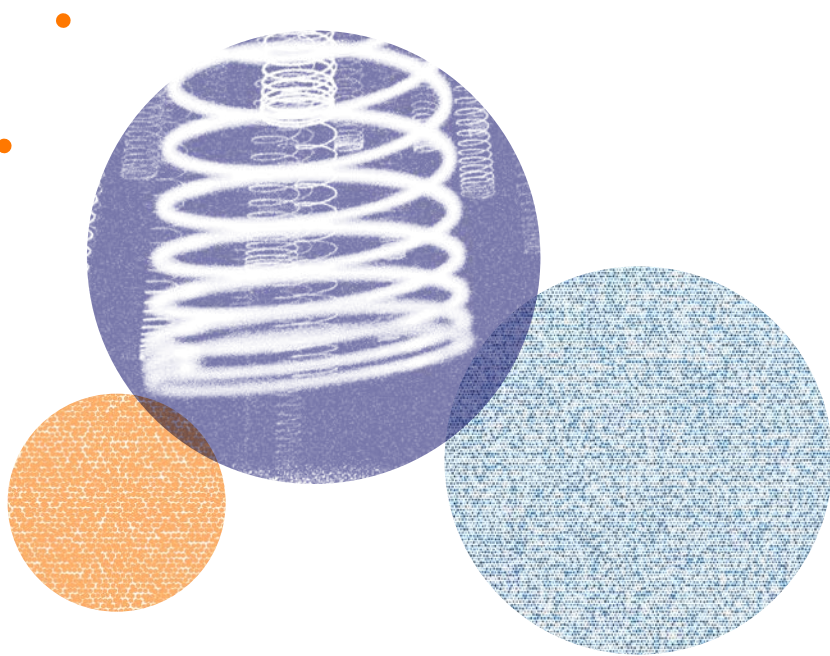
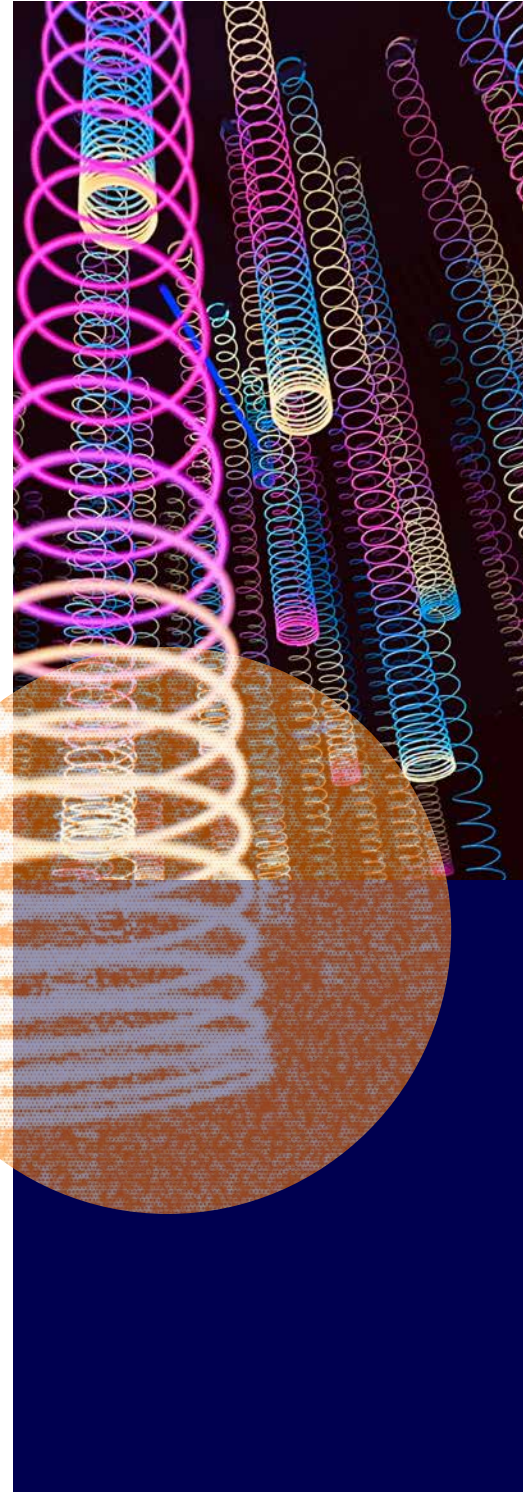
THE BRANDS THAT WIN ARE ALREADY DECIDED. MOSTLY.

There is a comfortable version of this argument: the shift to agentic commerce is gradual, LLM referral traffic is still a small fraction of total sessions, and brands have time. All of that is currently true, but none of it is the right frame.

The brands that will win the Invisible Shelf in 2026 are the ones building their Brand Data Core, encoding their cultural equity as machine reasoning, and developing their occasion vocabulary today. The infrastructure takes time. The brand work takes years. The window to build a structural advantage on the Invisible Shelf is open now, and it will not stay open.

The good news is that the Invisible Shelf rewards exactly the things great brand building has always rewarded: clarity of identity, depth of cultural equity, precision of occasion relevance, and consistency of creative expression. The brief has changed. The fundamentals have not.

- WIN THE MACHINE. MOVE THE HUMAN. THAT IS COMMERCE THAT WINS.





HOW WPP ENTERPRISE SOLUTIONS CAN HELP

WPP Enterprise Solutions helps brands protect decision share as commerce shifts from browsing to AI-mediated recommendation by structuring priority moments and intents into actionable content and measurement strategies that perform across retailer agents (e.g., Alexa for Shopping, Sparky), search agents (Google AI Overviews), and general LLMs.

Amanda Bailey is Chief Client Officer and North America Commerce Lead at WPP Enterprise Solutions. Molly Schonthal is an Agentic Commerce Strategy Leader at WPP Enterprise Solutions. Together they are partnering to guide WPP Enterprise Solutions clients on agentic commerce transformation with a priority focus on CPG, Beauty, Apparel, and Consumer Health industries.

ABOUT WPP ENTERPRISE SOLUTIONS

About WPP Enterprise Solutions

WPP Enterprise Solutions designs, builds, and operates the growth systems that competitive businesses rely on. In a world where AI is reshaping how companies drive growth, we lead clients in business transformation and marketing modernization, connecting strategy directly to execution. Our 12,000 experts in engineering and platforms, commerce, consulting, content transformation, CRM, and CX, work within a unified global operating unit across 40+ markets. WPP Enterprise Solutions works alongside best-in-class partners including Adobe, AWS, Braze, Google, Microsoft, Salesforce, and Shopify, as well as innovators in AI, to deliver growth solutions tailored to the needs of our clients' businesses. We have received distinction as a leader in Commerce Services and CX Strategy Consulting by the Forrester Wave™ reports and are designated by Gartner's Magic Quadrant™ as a Visionary in Digital Experience Services.

About WPP

WPP is the trusted growth partner for the world's leading brands. WPP combines cutting-edge media intelligence, world-class creativity, next-generation production, and transformative enterprise solutions to drive growth at scale. WPP is a publicly listed company (NYSE: WPP).

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