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Rapid Response

Collapsing the funnel

How personal memory and agentic commerce will capture value

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WE Create WHAT'S NEXT

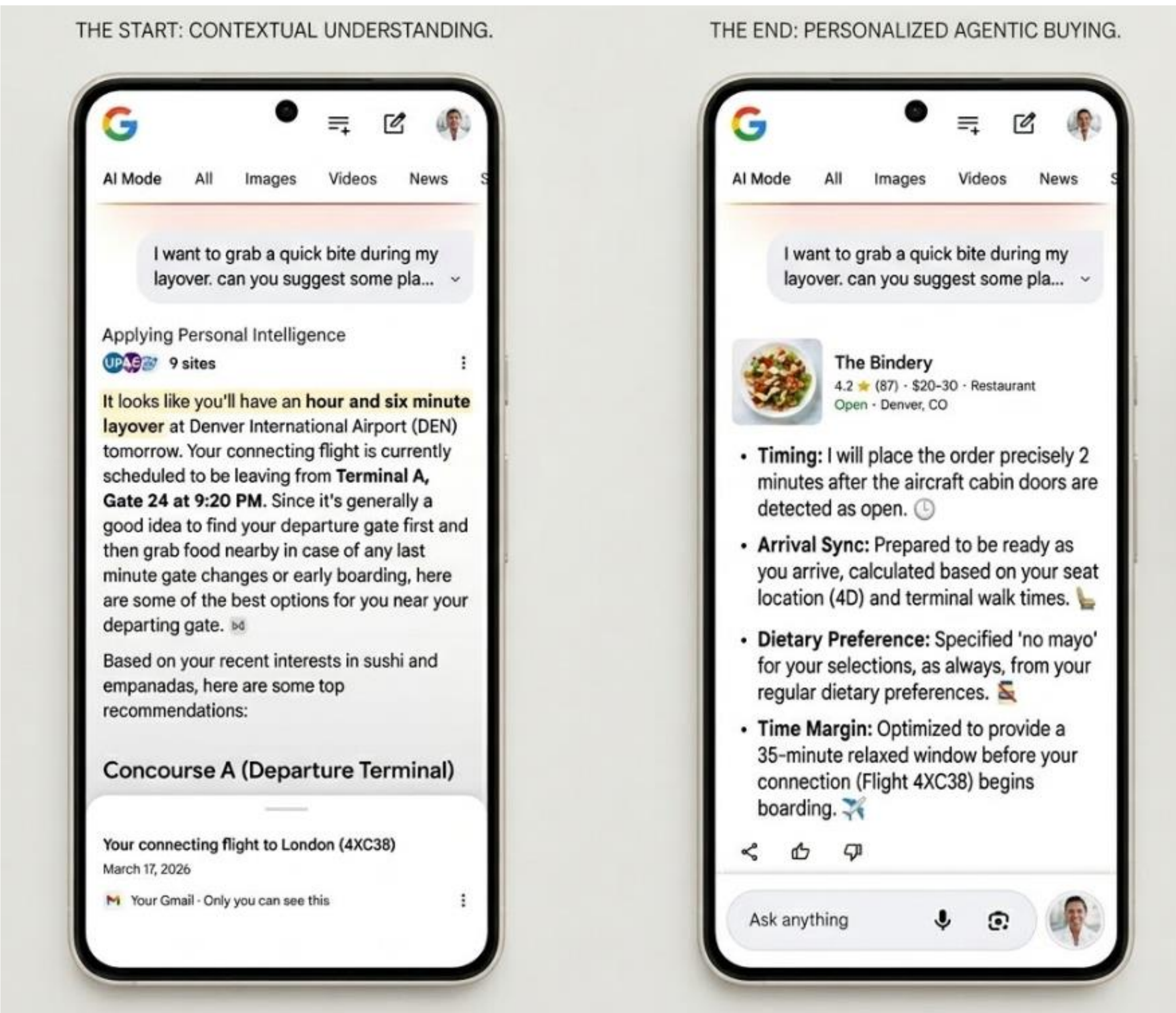
The Closed Loop

Three signals landed this week that, read together, describe the same structural event: the deliberate closure of the space between consumer intent and commercial outcome, with Google as the sole intermediary.

This isn't a trend. It's the completion of a strategy that has been years in motion, and this week it crossed a threshold that brands, agencies and publishers should treat as an inflection point.

Google expanded Personal Intelligence to all free US users, less than two months after the feature launched for paid subscribers in January 2026.

Personal Intelligence connects Gemini to a user's Gmail, Google Photos, YouTube history, and Search activity, allowing AI Mode to answer questions with the full context of a person's life as its foundation.



Whether you're looking for the perfect bag to match shoes you recently purchased or planning a trip based on hotel confirmations and past travel memories, Personal Intelligence removes the need to provide context to Google because Google already holds it.

The feature is opt-in and framed as a privacy-respecting convenience. That framing is technically accurate and strategically misleading. At scale, across tens of millions of free accounts, what it delivers is a context layer that no other platform can match.

No other major AI platform currently combines the breadth of Google's personal data access for free users. Many other Ais' memory store context users provide manually but cannot access a Gmail inbox, or YouTube history or photo library.

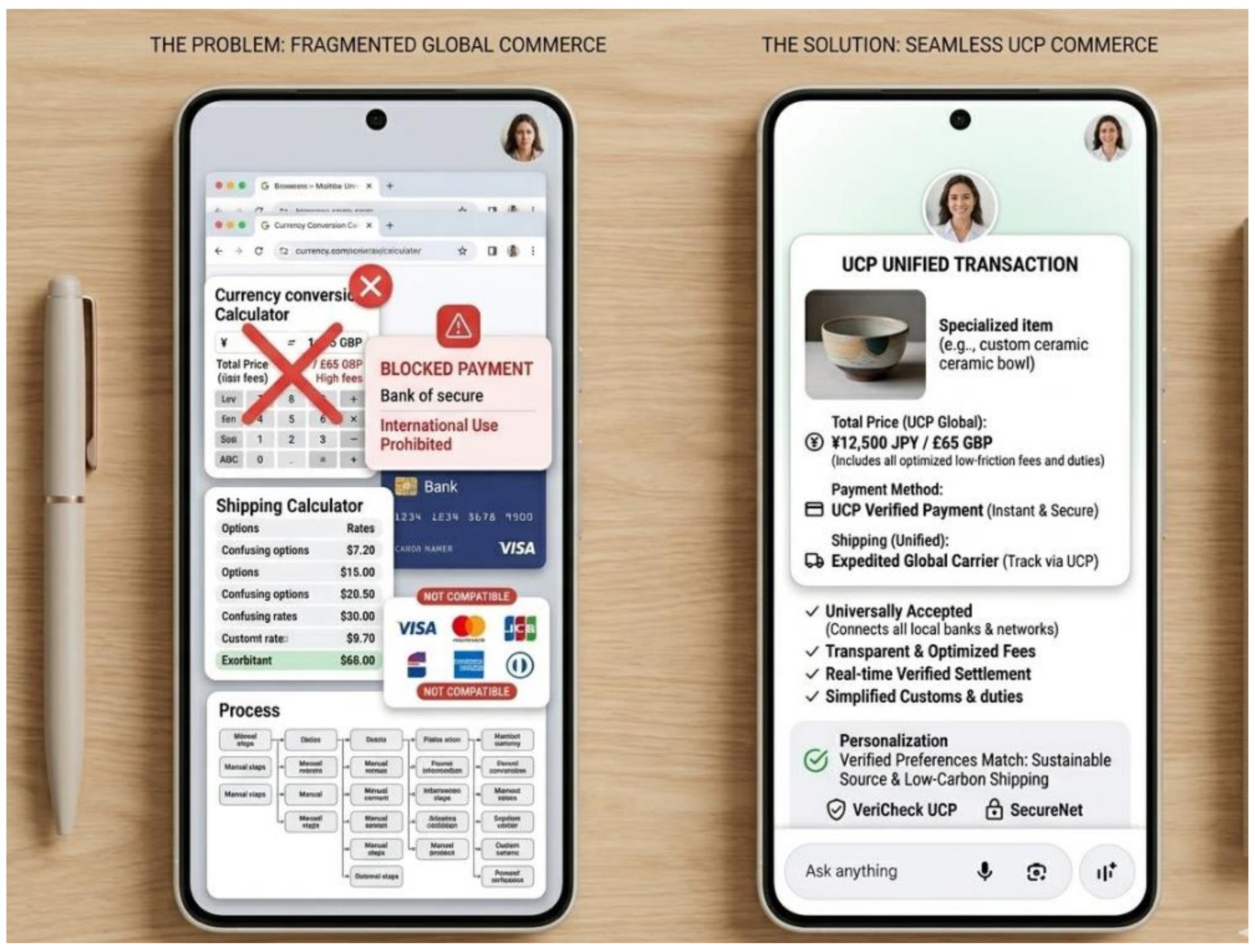
Google's moat is not the Gemini model; it is the memory across a range of surfaces consumers have been interacting with for decades.

Commerce Is Becoming Protocol-Driven

Google updated UCP with new Cart and Catalog capabilities that let AI agents manage multi-item baskets and pull real-time product details, while Identity Linking lets shoppers carry loyalty pricing and member benefits across platforms.

The Universal Commerce Protocol, launched at NRF in January 2026, has now matured from a single-item proof of concept into a functional commerce layer.

Platform partners, including Salesforce, Stripe, and Commerce Inc., confirmed plans to implement UCP, lowering the integration barrier for the long tail of retail. While the protocol is presented as an open standard, it is designed, maintained and primarily surfaced by a single platform, which could create dependency over time.



The word "agentic" appears throughout UCP documentation describing a model in which an AI agent takes actions on the consumer's behalf based on prior consent, checking products, verifying pricing, applying discounts, and completing purchases without the consumer initiating each step manually.

In an agentic commerce model, the agent chooses the surface, and the surface is Gemini. Google plans to bring relevant UCP capabilities to shopping experiences in AI Mode in Search, the Gemini app and beyond.

Considering these two signals together, and a single architecture emerges: Google now holds the personal context that shapes what a consumer wants, and the commercial protocol through which that want is satisfied, all within one continuous interaction.

The journey from desire to transaction no longer touches the open web. Personal context narrows the consideration set. UCP routes the transaction. It even encompasses more traditional channels; the new Gemini 3.1 Flash Live is a voice AI that is fast enough for natural-feeling phone calls.

What This Means for Brands

For the brands that have spent a decade optimizing for an open-web model — SEO-driven discovery, editorial partnerships, content marketing as a traffic acquisition engine — this week's signals require a fundamental reorientation.

The implication of Google's Personal Intelligence rollout is not about privacy. It is about the determinism of recommendation.

When an AI surfaces shopping options calibrated to your purchase history, your email receipts, and your past searches, brand discovery becomes a function of whether you are already present in a consumer's data footprint.

New brands, challenger brands, and brands that are not natively embedded in Google's ecosystem face a recommendation surface that structurally favors incumbents.

This is what OM's Recommendation Equity framework identifies as the core competitive arena of the agentic era: not reach, not creative quality, not even share of voice but the degree to which a brand has earned its position in the decision logic of autonomous systems.

The imperative of Generative Engine Optimization aligns well with these requirements and provides the short-term sales return and long-term platform for a very different landscape. There are several key objectives to not just be considered but recommended again and again.

Each operational workstream contributes differently to the three competitive arenas and the policy formation layer. The matrix below shows primary (●) and secondary (○) contributions.

Workstream	Eligibility	Justification	Defaults	Policy Form.
Product Schema & Data	●	○	–	–
Review Ecosystem	–	●	○	–
Trusted Party / Verification	–	●	○	○
Aligned Advertising	○	○	○	●
Influencer Networks	–	●	–	○
Content Programmes	○	●	○	–
SEO / GEO Technical	●	●	–	–
Agent Platform APIs	●	○	●	–

The UCP trajectory makes the distribution question equally concrete. For SEO professionals and digital marketers, product visibility is increasingly going to be determined by how well the product catalog integrates with UCP-compatible agents, not just how well your pages rank.

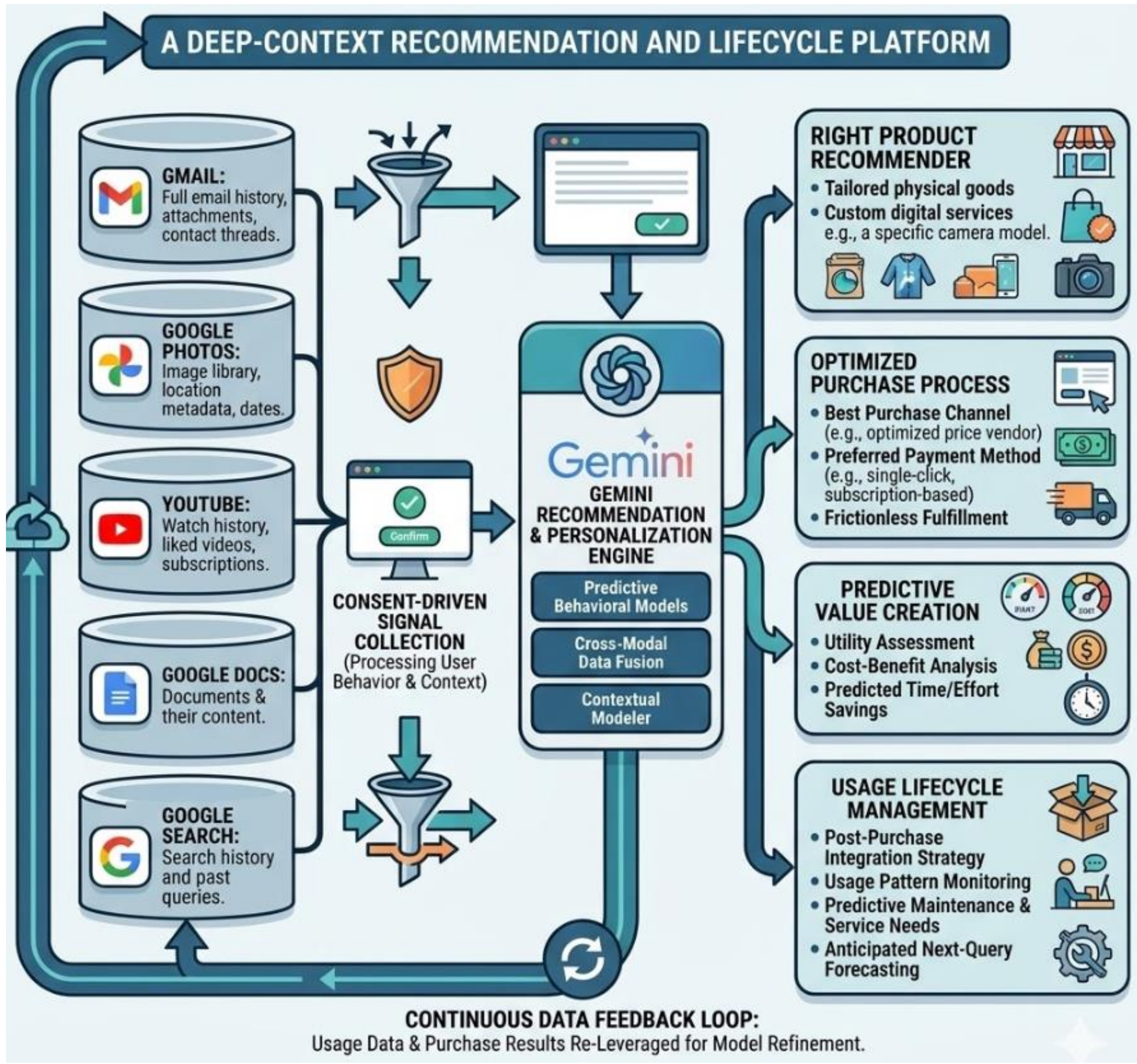
Brands that are not enrolled in Merchant Center, whose product feeds are incomplete, whose loyalty infrastructure is not wired for Identity Linking, will simply not exist in the agentic shopping layer Google is building.

This is not a future problem. UCP-powered checkout is already live for US shoppers on Etsy and Wayfair. Shopify, Target, and Walmart integrations are next.

The window for first-mover positioning is open, but not indefinitely.

Implications for Innovation

There is a temptation to frame this as a privacy story, or a publisher rights story, or an antitrust story. It is all three, but it is primarily a market structure story. Google's closed loop is not finished. Google is in a direct race with OpenAI's memory features in ChatGPT and Anthropic's Projects feature in Claude (even the new Auto Dream). The direction from all three is identical: every major AI will have persistent, personalized context as a free feature.



This changes the role and context of existing marketing channels — for instance, affiliate programs as more commercial value can be embedded in and created by influencers and stakeholders. The role of brand email also changes; when Gemini can read an inbox, the long list of rarely read emails from brands shifts from being a long shot to a personalized pitch to the user's AI, influencing future recommendations.

The question that should be on every CMO's desk this week is not whether to participate in Google's ecosystem; that decision has already been made by consumer behavior.

The question is what role the brand intends to play inside it: passive participant, catalogued and surfaced when an agent decides what is relevant; or active shaper, investing in the data infrastructure, feed quality, and first-party signals that determine how that agent makes its call.

Brands that treat UCP as only a technical project for their ecommerce team, and Personal Intelligence as only a privacy matter for their legal team, will discover too late that both are a single strategic question: who owns the outcome in the closed loop?

Jean-Paul Edwards

Managing Director, Product
OMD Worldwide