2025 Edition

New Modes:

How AI is Shaping New Commerce Contexts and Expectations

Future Commerce

Commerce™

A Commerce x Future Commerce Insights Report

INTRODUCTION

There's a moment in every sci-fi dystopia where the protagonist realizes they've been living inside the machine all along. For modern consumers, that moment arrives quietly: not through dramatic revelation, but through the gentle vibration of a phone notification reminding them about items left in seventeen different carts across the internet.

We've crossed a threshold. Shopping is no longer *something we do;* it's *something we are.* Our research reveals that nearly half of all consumers now maintain a perpetual mental shopping list, but the more fascinating story lies in how this constant state of commercial consideration has become our baseline cognitive mode.

There is a clear reason why: shopping is no longer a brand-controlled experience confined to linear journey flows and cookie-cutter site experiences. And commerce is no longer confined to specific channels or destinations. It can happen anywhere, at any time.

Gen Z and Millennials don't just shop more frequently than their parents; they exist in an entirely different relationship with commerce itself.

In this breakthrough report, we uncover the New Modes of purchasing: the always-on, default of passive consideration, whereby nearly half of all consumers (48%!) say they feel as if they're always keeping a mental list of things to buy. We'll break down generational attitudes towards AI, social shopping, and our comfortably uncomfortable relationship with the new normal.

"I am always in some phase of shopping and keep a mental list of things I'm interested in purchasing."

The Shopping Consciousness Spectrum

2 in 3 Millennials live in perpetual purchase consideration

Gen Z is **2x more** likely than Boomers to wake up with commerce on their minds

For every Boomer actively shopping, **2 exist** in passive mode

The majority of under-45s have transformed shopping from activity to **identity**

More contextual platforms like YouTube, ChatGPT, and WhatsApp are becoming core destinations for communicating and consuming content. The advertising and paid content models embedded into these platforms make them equally valuable for forming authentic connections as they are for powering commerce.

Gen X and Boomers are more likely to spear fish, using search engines and Amazon to shop when there is a clear, intentional need. With nearly 70% of Boomers indicating that they do not passively consider purchases, they seek a more direct and targeted approach than younger consumers, who are evidently in a continuous cycle of cultural participation, trend discovery, and product curation.

In this report, we'll explore the key themes from the research, which reaffirm our new omnimodal reality.

1. Media and community platforms, from YouTube to WhatsApp, are contextualizing commerce and bridging the gap between inspiration and conversion. These sites are part of all consumers' digital diets, which makes them critical platforms for brand participation.
2. LLM platforms like ChatGPT are increasingly becoming commerce companions, with 46% of Millennials and 41% of Gen Z using them daily. With commerce being embedded into these platforms as we speak, we believe AI will further collapse the commerce funnel.
3. Consumers are subscribing to a more intentional digital marketing ideal. While respondents to last year's survey favored short-term wins and blanket cart abandonment emails, this year's respondents are looking for more curated deals and offers based on their interests (42%) and recommendations based on search history (35%).

Methodology

Future Commerce and Commerce partnered with Centiment to conduct an online survey of 1,000 consumers in June 2025, evenly split between males and females.

Respondents varied in terms of their age and geographic locations. To ensure we had a balanced view of behavioral trends and shifts, the final respondent pool was evenly split between the **US, UK,** and **AU/NZ,** as well as the following age demographics:

Gen Z	18-28
Millennials	29-44
Gen X	45-59
Boomer	60+

In some scenarios throughout this report, we will delve deeper into how the psychographic and cultural contexts of specific generations may be driving new trends and expectations. In others, we will tap more into geographic location to better determine whether consumer adoption of particular channels and technologies correlates with different markets. In both scenarios, our objective is to understand how context, in its various forms, affects our participation in commerce.

THE GREAT CHANNEL DIVERSIFICATION

The smartphone is no longer a device we use to accomplish a specific set of tasks. It is now an ancillary tool that empowers us to communicate, create, share, and participate in the modern world. All through a handheld touchscreen, we work, play, and shop.

Device usage, across all ages and geographies, reaffirms this. The data indicates that consumers are more likely to own a smartphone than a desktop computer or laptop, and consequently, they are more likely to use smartphones (40%) than computers (28%) and tablets (11%) to make online purchases. Desktops and laptops are now commonly referred to as “work devices,” while tablets are used for media consumption and the occasional creative task.

Despite our mobile-first mindset, commerce is being embedded into more channels and devices, inspiring consumers to test a more diverse range of platforms for consuming and engaging with brand content. Over the past six months, consumers have used Connected TV (CTV), streaming video devices, connected gaming consoles, and, in some cases, even wearables, to purchase products or services.

Consumers are also increasingly using a broader range of apps and platforms every day. Over one month, consumers said they tapped into these ten the most:

facebook	69%	Instagram	47%
YouTube	68%	TikTok	37%
amazon	57%	ChatGPT	31%
Google / Bing	55%	X	27%
WhatsApp	47%	TEMU	25%

There are some minor geographical distinctions, but clear trend lines indicate fascinating shifts in online behavior—and new opportunities for merchants. For instance, consumers are more active and loyal users of YouTube than they are of search engines and even Amazon. More people also noted using WhatsApp than TikTok.

This growing middle market of apps reflects a tangible shift in how consumers engage with commerce. Content, context, and community engagement are driving online activity, and they are becoming more authentic and influential sources for browsing and buying.

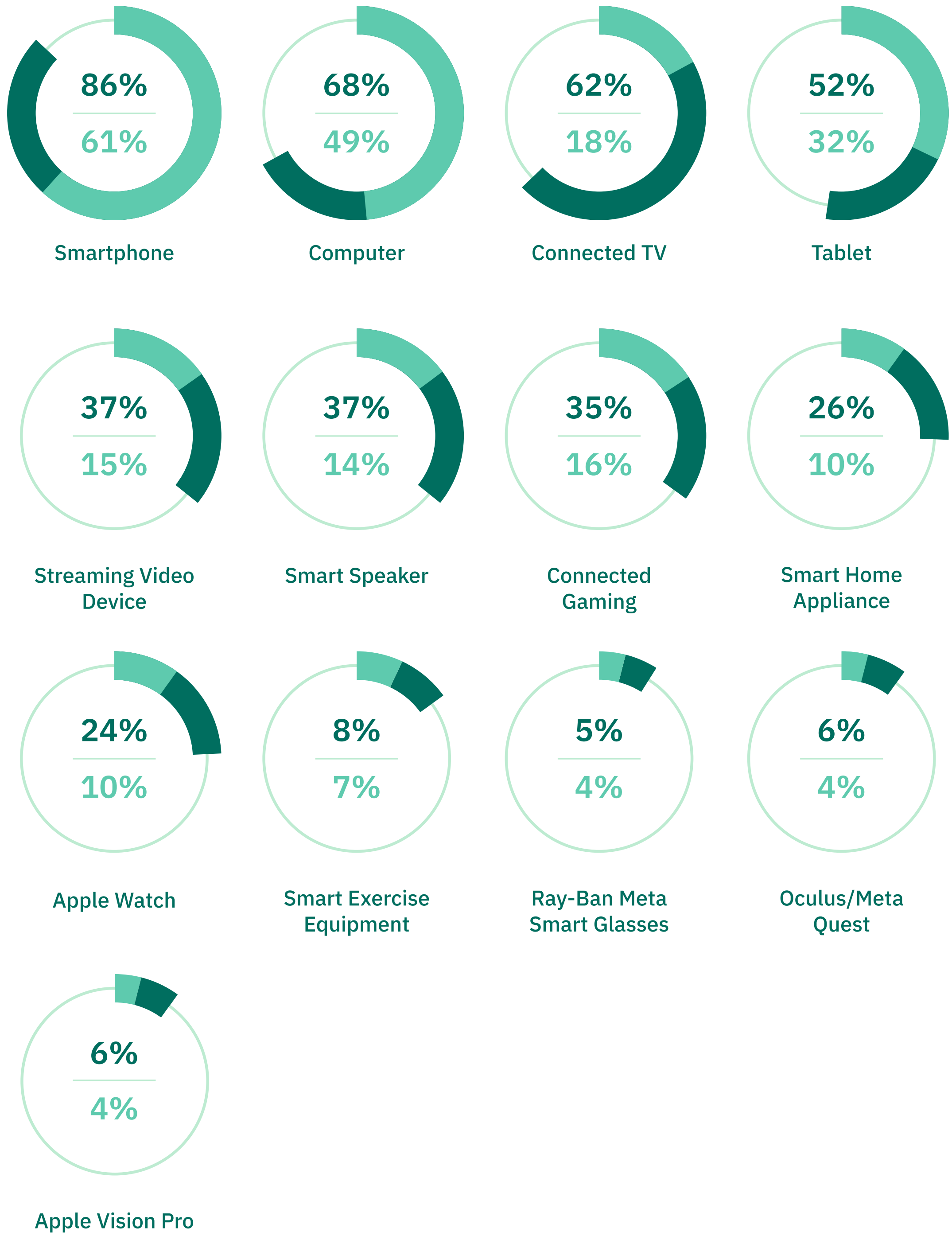
The convergence between content and commerce continues to evolve. And consumers’ omnimodal behaviors are solidifying before our eyes.

Respondents

Which of the following devices do you personally own and use?

Respondents

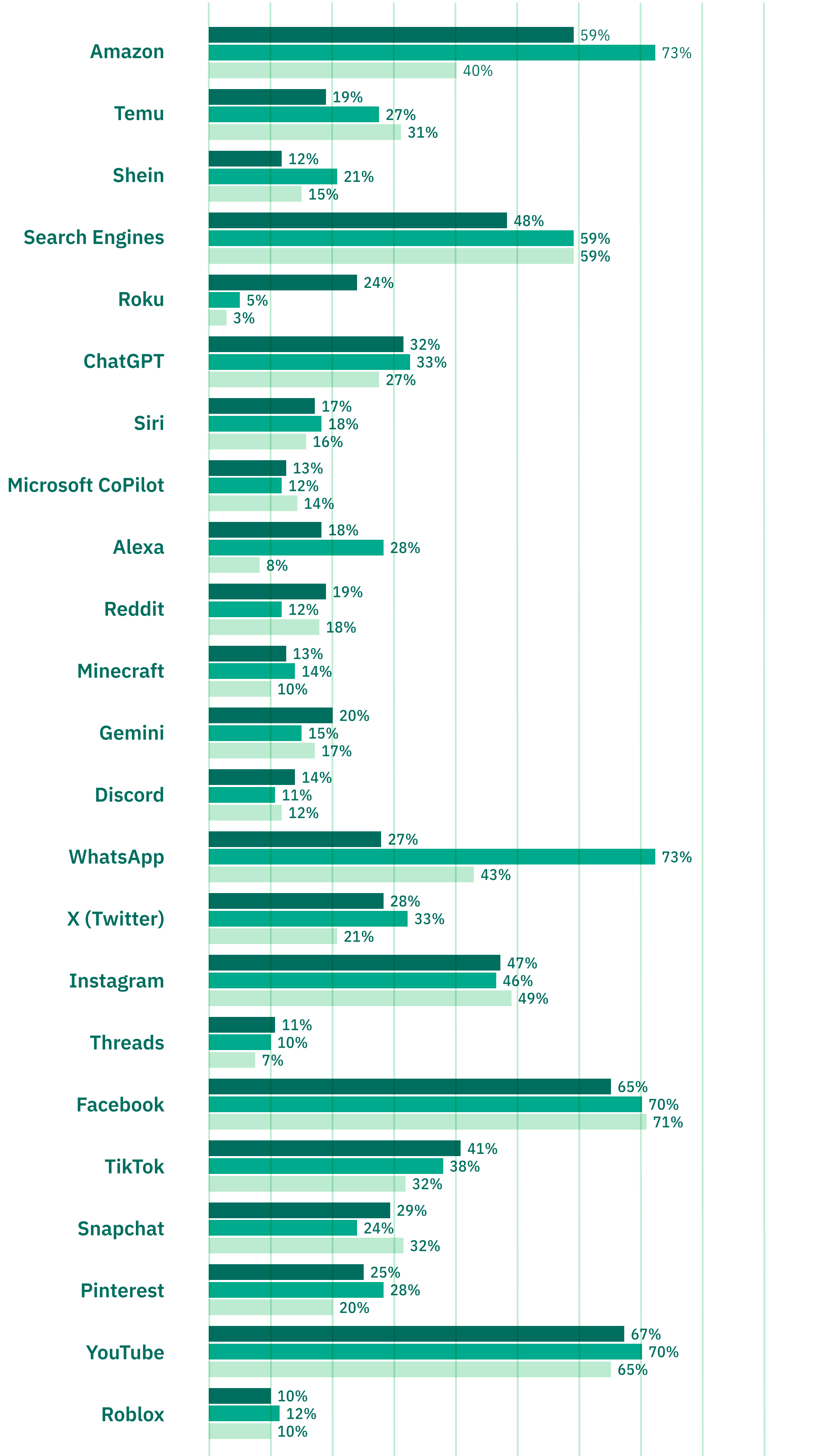
Which of these devices have you used to purchase physical goods, content, or services in the past 6 months?



Respondents selected as many devices and purchasing habits as applied to them

Which of the following platforms have you used within the past month?

USA
UK
AU/NZ



OMNIMODAL BECOMES OMNIPRESENT

When consumers have that magical moment when they're motivated to act, they can now quickly and easily add an item to their cart.

Our digital footprints are venturing further across the web. We're using more channels, tools, and platforms to support our needs, whether that's paying bills, consuming news, or watching content. The defining traits of an "omnimodal mindset" reflect this reality. For many, "shopping" is so much more than a momentary, transactional act. It is a state of being, comprising equal parts culture, social participation, and identity.

In last year's survey, four out of five consumers admitted that it was rare for them to go a week without researching and making an online purchase. Although purchasing products and services was not the top activity this year, that doesn't mean consumers aren't always thinking about shopping in some capacity. Judging by the different apps and devices they use, most consumers are always innately thinking about the next thing they're going to buy, and are using various sources to collect information and get inspired. When they have that magical moment when they're motivated to act, they can now quickly and easily add an item to their cart.

Top 5 Online Behaviors Year Over Year

2024		2025	
87%	Purchase Products/Services	66%	Pay Bills/Manage Utilities
81%	Research Brands, Products, and/or Services	65%	Communicate/Connect with Friends/Family
78%	Watch Streaming Video Content	61%	Watch Streaming Video Content
78%	Listen to Streaming Audio Content	58%	Purchase Products/ Services
73%	Interact with Customer Services/Support	52%	Access News/ Current Events

But which channels are influencing consumer education, product comparison, and product purchase the most?

The modern browsing and buying journey is not one-size-fits-all. Shoppers have their unique preferences. And in some cases, those preferences vary depending on the product or service they're searching for. As a result, the channel mix for each stage of the decision-making journey is broadening. Once-universal platforms like search are becoming less dominant in the shopping journey, while new platforms, such as ChatGPT and even fast-fashion retailers, are gaining prevalence.

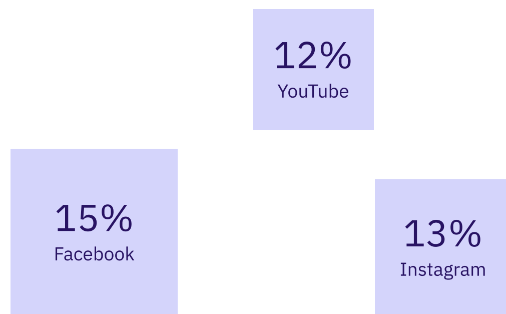
The Commerce Journey has Left the Building

*Consumers' **top three channels** for discovery, comparison, and purchase*

1.

Discovery

The holy trinity of accidental shopping: Facebook (15%) → Instagram (13%) → YouTube (12%)

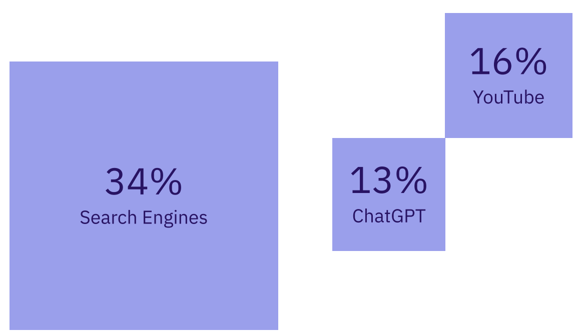


Note: *Modern brand and product discovery is happening on social, creator-led platforms. These are media-rich environments that allow users to mindlessly scroll and self-select when and where they want to dig deeper.*

2.

Product Comparison + Research

Search engines still lead (34%) but barely... YouTube (16%) + ChatGPT (13%) = 29% combined

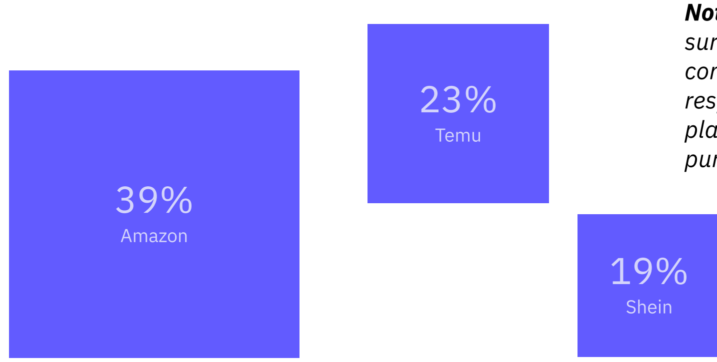


Note: *Following ChatGPT, several platforms (including Gemini, Reddit, Siri, and Pinterest) were each cited by about 10% of respondents. This reaffirms that there is a longer tail of tools shoppers use to meet their needs.*

3.

Purchase

Amazon (39%) vs. The Emergents: Temu (23%) and Shein (19%)

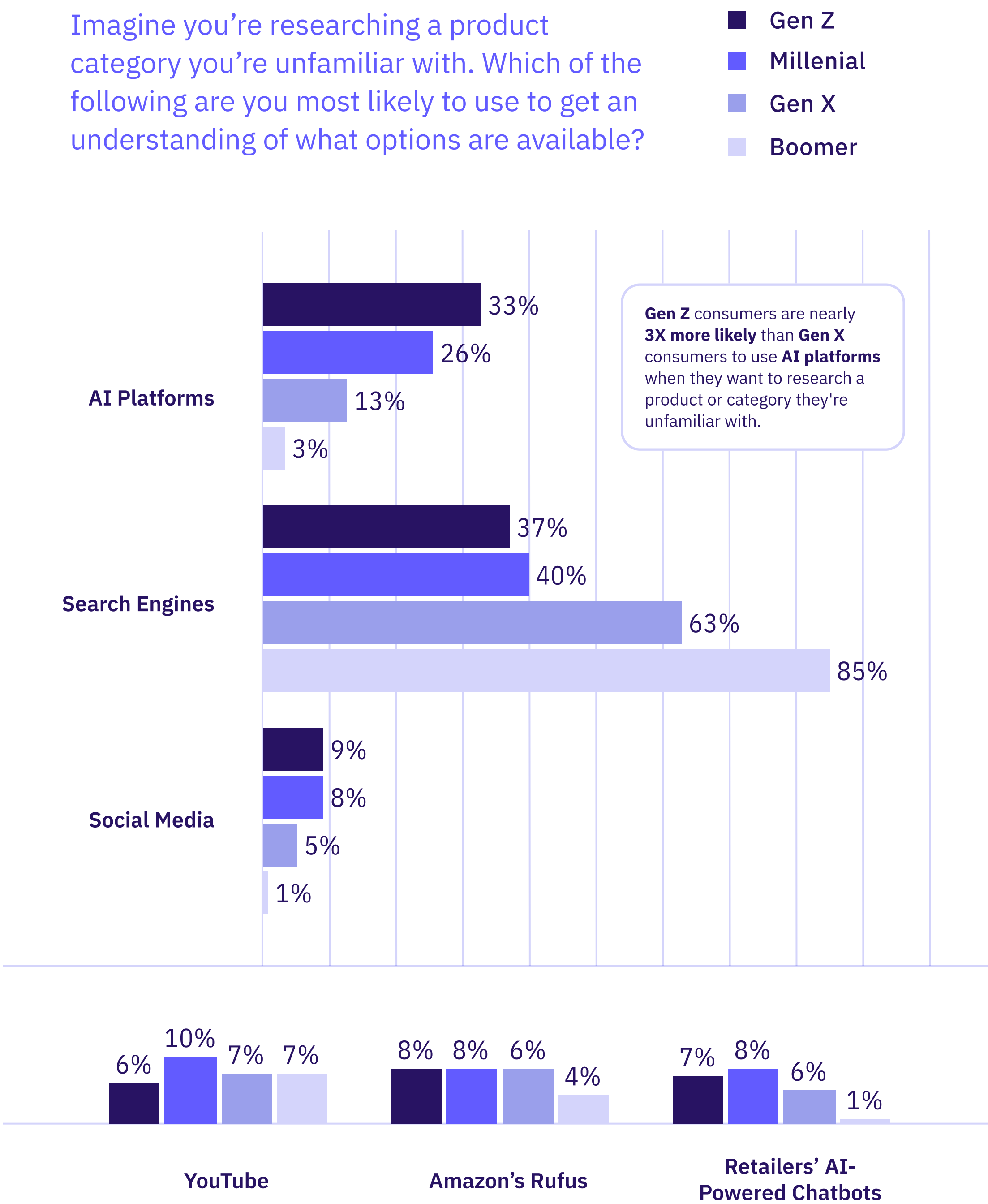


Note: *Despite the hype surrounding social commerce, very few respondents use these platforms to actually make purchases.*

Consumers may also have different definitions of these different journey stages, including their key objectives and even associated tasks. That is why we wanted to create a clear-cut comparison among demographics and how they use various platforms for a defined task: researching a product and/or category they're unfamiliar with.

For younger consumers (Gen Z and Millennials), search and AI are nearly neck and neck as the primary destinations for early-stage product and category education. Meanwhile, older demographics still largely favor traditional search engines for this process.

Imagine you're researching a product category you're unfamiliar with. Which of the following are you most likely to use to get an understanding of what options are available?



Key Takeaways

Although Amazon is a top destination for Boomers to compare and purchase products, **Gen Z** is **twice as likely** to use **Amazon's AI tool** to learn about brands and products. This tells us that for Gen Z, shopping is equally an educational, discovery-powered experience as it is about checking off a list. It is just as much about utility as it is about inspiration and exploration.

YouTube and **social media** are widely used by **Gen Z** and **Millennials** for two highly specific scenarios: high-level education and inspiration, and demos and reviews for specific products. In cases of broader category research, consumers are looking to cast a broader yet more pointed net, understanding the scope of a category but also gauging the best options (product lines and brands) for that category.

THE AI INFLUENCE

Large Language Models are bringing the omnimodal promise to life. Trained on massive amounts of text data, LLM-powered platforms like ChatGPT, Perplexity, Gemini, and others have the power to understand, create, and manipulate human language.

What we're witnessing isn't just the adoption of new tools. It's the birth of commerce's first truly post-human interface.

When a quarter of Gen Z trusts AI recommendations more than human ones, we're not talking about efficiency. We're talking about a fundamental shift in how authority and authenticity are constructed. The algorithm doesn't judge your midnight anxiety purchases or your contradictory brand loyalties. It simply serves, and in that service, becomes more intimate than any human relationship with commerce has ever been.

At their most basic level, these platforms can complete a growing range of tasks, whether it be answering simple questions or completing basic projects. However, their rapid evolution and maturation make them invaluable for more complex user needs. As a result, they are becoming go-to tools, resources, and even companions for consumers, not just for shopping-related activities but for daily social, psychological, and even emotional needs.

We're living in a new age where AI is our new "imaginary friend." ChatGPT may not have flesh and blood, but its ability to process, understand, and contextually respond to every individual user in the world makes it very much real to us. And it is clear consumers are eager to test and prove out what the leaders of these platforms are promising to humankind: an intimate, highly knowledgeable confidante to serve our needs.

In fact, 41% of all respondents use AI platforms at least weekly, while 26% say they use them daily (if not several times a day). When broken down generationally, there is a clear definition for AI platform "power users": both Millennials and Gen Z consumers are more than twice as likely as Gen X to use these platforms. When compared to Boomers, the adoption gap is much wider, with only 3% of our oldest demographic claiming they use AI platforms at least once a day.

> "People talk about the most personal sh*t in their lives to ChatGPT... young people especially, [they use it as their] therapist, a life coach."
>
> —Sam Altman, CEO, OpenAI, on Theo Vonn's This Past Weekend

46% of Millennials and Gen Z use AI tools daily

11x Gen Z uses AI for product research 11x more than Boomers

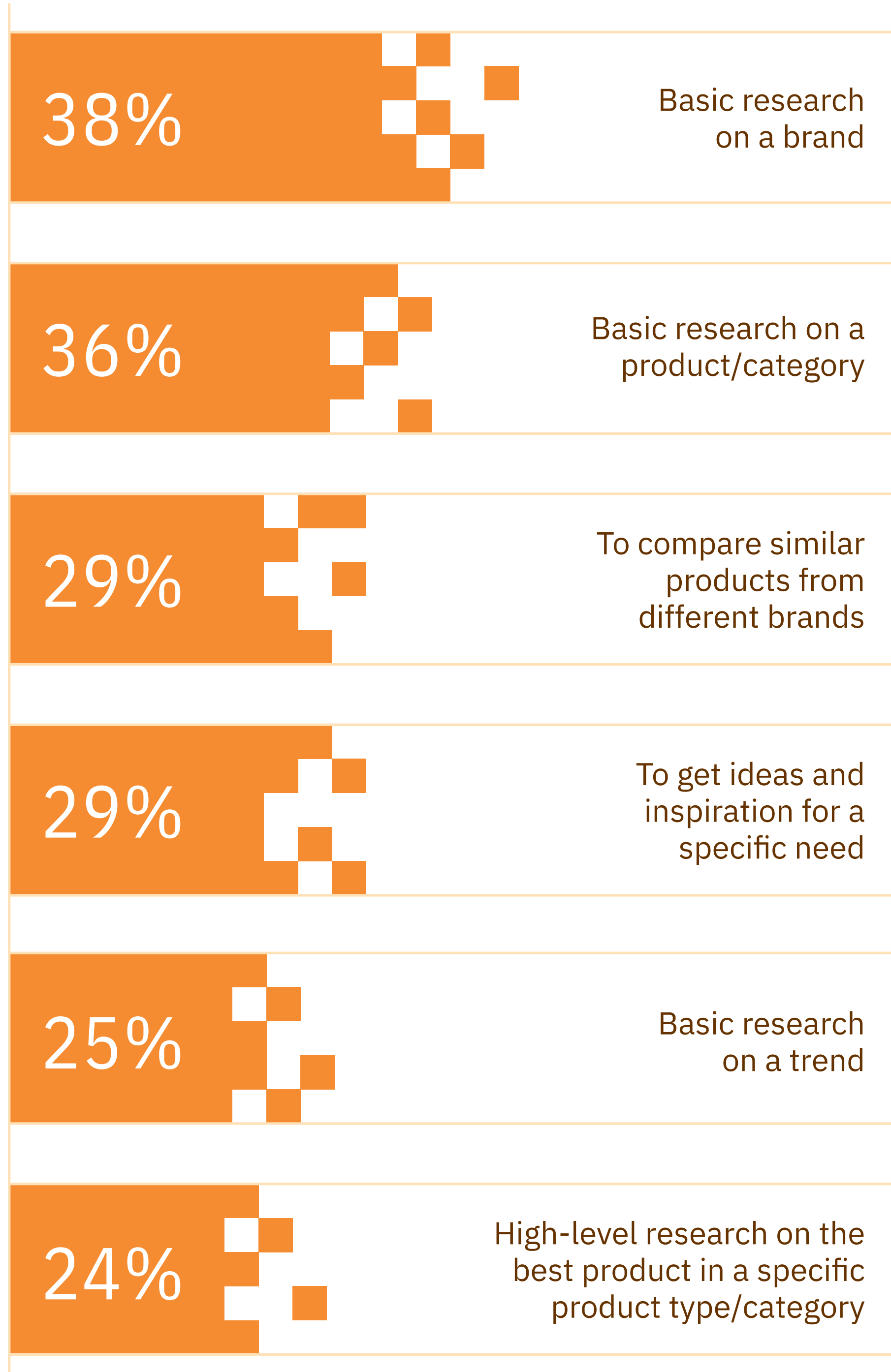
-50% AI usage drops 50% after age 45

The growing prevalence of these tools, especially for mid-funnel activities like comparing specific products and brands, reaffirms how critical it is for brands to understand when and why their target customers use AI. From there, they must develop an Answer Engine Optimization (AEO) or Generative Engine Optimization (GEO) strategy that includes rich brand and product data that will ultimately feed these platforms.

In an omnimodal era, brands don't control the experience or the narrative. The new key to success is ensuring your brand shows up and effectively serves customers' needs, no matter where they are.

In what scenarios have you used AI platforms for shopping related activities?

Respondents selected all that applied.



Trustworthiness

Gen Z (23%) and Millennials (27%) are more likely to say:

> "I'm starting to trust AI platforms more for curated product recommendations than real people."

However, there is a clear connection between usage and trust, which is why so few Gen X and Boomer respondents agreed with this statement. If a consumer has used a particular tool or app consistently, they are more likely to understand its value and, in turn, have trust in it.

Intimacy

13% of all consumers say:

> "Using voice assistants like Siri and Alexa feels more intimate than typing a search query."

Gen Z consumers (22%) are more likely to have these sentiments than Boomers (6%). However, as a collective, global consumers clearly feel an intimate connection with their AI assistants. The act of verbally speaking to another voice on the other end of a device feels incredibly personal, regardless of whether that voice belongs to a living being. And with Perplexity and ChatGPT also offering talk-to-chat capabilities, it's no wonder that some users are growing so connected to their virtual assistants and chatbots that they're actually falling in love with them.

Reliability

13% of consumers agreed:

> "I feel like an influencer is motivated to sell me something. AI isn't."

The influencer marketing industrial complex is expected to generate $32.55 billion in revenue by the end of 2025. The market is getting larger, with hyper-niche creators building their brands daily, and consumers are reaching a tipping point: while they may like and follow creators, they may not necessarily trust or rely on them.

The social media age has democratized information. Ironically, that means consumers can access content that explains the psychology of marketing and how social media is used to manipulate their behaviors. They understand how social media marketing, and specifically influencer marketing, works. They know it is a vehicle for both creators and brands to monetize attention. As a result, they're more critical of the content they consume on social media, with some going as far as to actively critique their favorite influencers when they believe content doesn't align with their "brand" and values.

Consumers view AI platforms as more reliable and more objective. Users ask a question or make a request, and they receive an answer perfectly aligned to their needs. However, many consumers may not fully realize that responses are based on the data these platforms are given. Consumers are more likely to receive tailored, arguably biased, information based on what they share over time. While these platforms are reliable, are they objective? Or are they simply imprisoning consumers in their own self-built echo chambers?

The core reality is that this sector simply hasn't gotten to the level of monetization or "undisclosed advertising" that social media has. ChatGPT and Perplexity are both exploring native commerce capabilities and advertising within their environments, though, so this perception may very well change.

ECOMMERCE AND THE AGE OF UTILITY

Consumers' continued shift towards an omnimodal shopping mindset raises an existential question about the future of commerce: If we're using more sources to consume content, gather information, and get inspired, why will we even use branded eCommerce sites in the future?

Current consumer insights uncover some very real truths about how people currently engage with eCommerce sites, and what they expect from the merchants that power them.

Online shopping is ideal in certain contexts.

61% of consumers confirm that "there are some products I'd never consider buying online."

Returns are still a major headache, creating an opportunity for brands to differentiate.

A shocking three-fifths of participants (58%) agreed that "returning purchases is the most frustrating part about buying things online."

A seamless and intuitive user experience is still critical.

Nearly three in five agreed (58%): "It bothers me when a brand I love has a poor website experience."

Intentional marketing and communication drive engagement.

55% of respondents said, "I would unsubscribe to a brand I generally like if they send me too many marketing messages."

Personalized, data-driven outreach, including deals, still has the most profound impact on conversions.

52% say they love getting brand/product offers, but only "when I'm actively researching and considering a purchase."

In an eCommerce context, consumers very much subscribe to the ideal of "get me what I want, when and how I want it." Because they're so actively consuming information and inspiration through other vehicles, they perceive branded eCommerce experiences as destinations to purchase products in the most seamless and value-driven way possible.

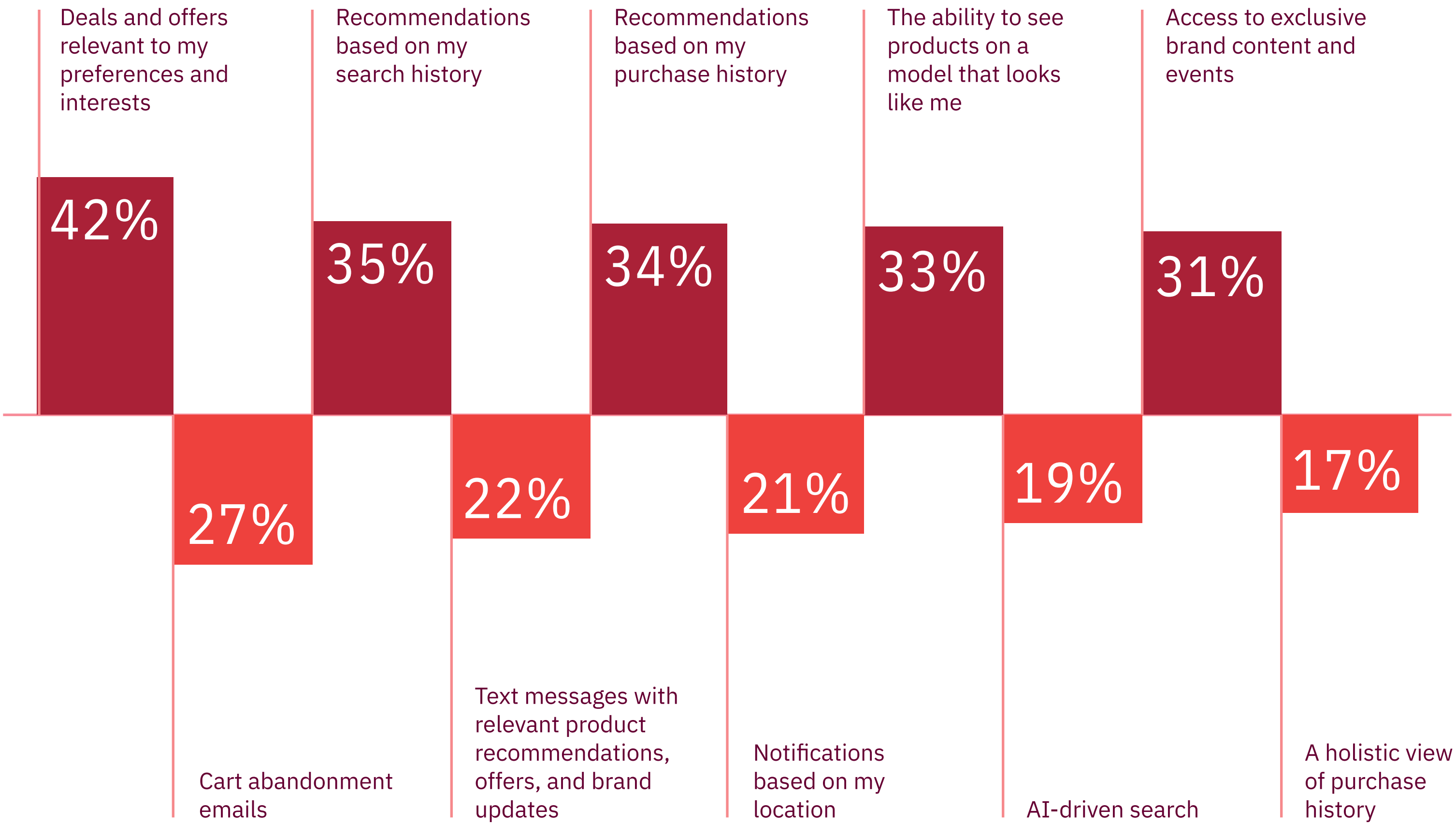
The Universal Barrier

Guest checkout remains a cross-generational pain point, with roughly 1 in 4 consumers across all age groups abandoning carts when forced to create accounts. This isn't a digital native issue—it's a human one.

Curation and intention are also top of mind for consumers as they engage with brand marketing campaigns across channels. Despite the real-time, personalized power of cart abandonment emails and action-based text message campaigns, people are opting for personalization that is richer and more contextual to their deeper needs. Just like last year's respondents, this larger pool of consumers indicates that contextual recommendations, combined with tangible benefits (including more tailored offers and incentives), is the ultimate equation for eCommerce success.

What do consumers want more and less of on eCommerce sites?

Top 5 - Want MORE



Top 5 - Want LESS

The Trust Paradox

27% of Millennials trust AI more than humans for product recommendations, yet 63% abandon carts when forced to create accounts. We'll bare our souls to algorithms but not to brands.

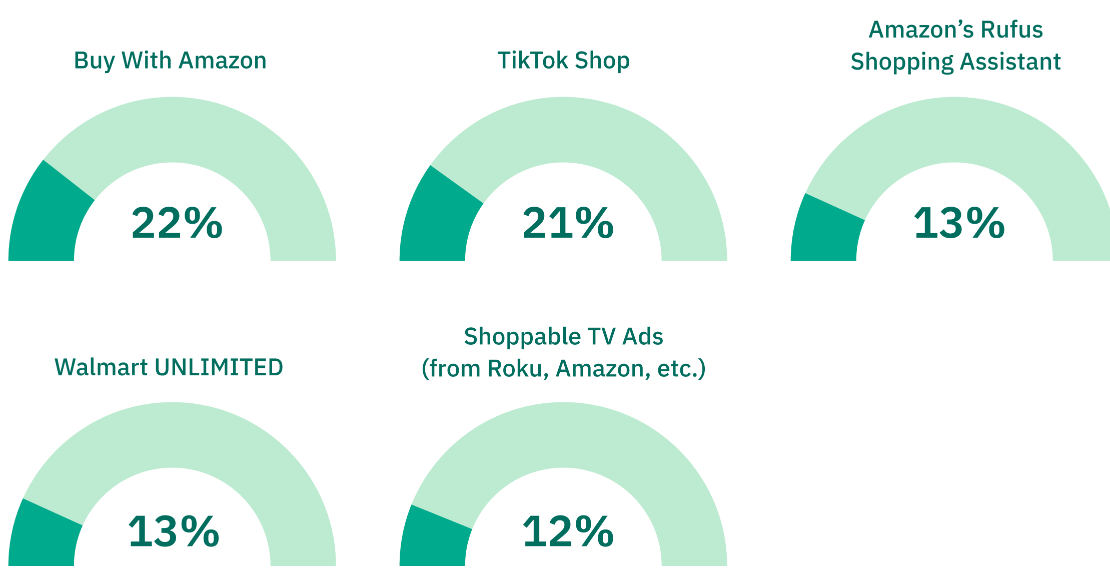
INTEGRATED COMMERCE: WE'VE BUILT IT, BUT WILL THEY COME?

The past year has seen numerous commerce innovations emerge and mature, from TikTok Shop to shoppable TV and gaming commerce.

These initiatives have garnered their fair share of media exposure, but are they actually being used by consumers in a meaningful way?

The survey results indicate that even the "most popular" new experiences are still relatively underutilized, especially shoppable TV ads, which are gaining traction in retail media, and immersive commerce experiences like Walmart UNLIMITED in Spatial. However, there are clear demographic nuances. For example, 44% of Gen Z respondents said they have used TikTok Shop. Gen Z is clearly the target demographic for TikTok, which indicates that the platform's efforts to grow through commerce are paying off.

Top 5 Most-Used Emerging Commerce Experiences



KEY TAKEAWAYS

As consumers diversify their use of different channels and platforms, **they're gravitating towards tools and experiences that align with their intent.** Commerce is always on the brain, but what value are we hoping to obtain from the experience?

When consumers want utility, they turn to platforms like Amazon and branded eCommerce sites. When they want discovery and inspiration, they turn to content-rich destinations like Instagram and YouTube. When seeking curated information and guidance, they turn to ChatGPT.

Contextual relevance remains the catalyst for brand affinity. Similar to the first installment of the New Modes Research in 2024, we are seeing consumers seek more meaningful experiences that have both nuance and contextual meaning.

For merchants, the power lies in understanding how these platforms can complement your brand experience, tapping into their unique attributes to serve customers in ways your branded eCommerce site cannot. In addition to embracing a true omnimodal mindset, you'll have the power to hone your branded eCommerce experience to focus on the content, tools, and feature-rich capabilities your consumers not only want but expect from your brand.

For brand futurists, the most profound shift isn't in how we shop, but in how shopping has rewired us. We've evolved from hunters and gatherers to browsers and cartists, perpetually suspended between desire and decision.

The question isn't whether this is good or bad—it's whether we can imagine ourselves any other way.

About Commerce

Commerce (Nasdaq: CMRC) empowers businesses to innovate, grow, and thrive by providing an open, AI-driven commerce ecosystem. As the parent company of BigCommerce, Feedonomics, and Makeswift, Commerce connects the tools and systems that power growth, enabling businesses to unlock the full potential of their data, deliver seamless and personalized experiences across every channel, and adapt swiftly to an ever-changing market. Trusted by leading businesses like Coldwater Creek, Cole Haan, Harvey Nichols, King Arthur Baking Co., Melissa & Doug, Mizuno, Patagonia, Perry Ellis, Puma, SportsShoes, and Uplift Desk, Commerce delivers the storefront control, optimized data, and AI-ready tools businesses need to grow, serve diverse buyers, and operate with confidence in an increasingly intelligent, multi-surface world.

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