From Insights to Execution in *AI-Powered Commerce*

A Strategic Playbook for Intelligent Growth

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Foreword

From the rise of social commerce and AI search purchasing to the disruptive pricing strategies of ultra-low-cost marketplaces, brands are navigating a landscape that is evolving faster than ever. At the same time, operational pressures are mounting.

Our research found that 78% of global ecommerce leaders say next-day delivery expectations are straining supply chains, while 76% agree that managing brand control across proliferating digital channels is increasingly difficult. The race to meet consumer expectations while maintaining profitability has never been more intense.

In this environment, Artificial Intelligence (AI) has become the strategic imperative, unlocking unprecedented opportunities across the entire ecommerce lifecycle.

It is no longer an emerging trend, but the infrastructure behind intelligent decision-making that is empowering brands to not only compete in today's volatile market, but to set new benchmarks for performance, customer trust, and responsible leadership in the years ahead.

With the global AI-enabled ecommerce market projected to reach $22.60 billion by 2032, AI is reshaping how brands operate, compete, and lead. For senior ecommerce leaders and decision-makers, the challenge now is to generate use cases for AI that drive measurable impact across functions.

Our Strategic Playbook for Intelligent Growth explains how the future of ecommerce belongs to those who lead with AI-driven intelligence.

Read on to learn how prepared leaders are to harness AI, how it's being applied across functions, and what strategic shifts are needed to build intelligent, adaptive organisations.

About the *Report*

This report is based on research conducted on behalf of Pattern by Censuswide between 2nd and 18th September 2025.

The study surveyed 1,018 senior business leaders and managers across the United Kingdom, United States, United Arab Emirates and Germany.

Respondents work in ecommerce, sales, marketing, finance, legal, or operations/fulfilment teams within organisations generating a minimum annual ecommerce revenue of $3 million.

The Current *State of Affairs*

Ecommerce is a dynamic, multi-layered ecosystem shaped by rapid technological change, shifting consumer expectations, and intensifying competition.

Social commerce has moved firmly into the boardroom, **with 79% of global ecommerce leaders believing platforms like TikTok Shop are redefining customer purchasing behaviour,** bringing entertainment and commerce into a single scroll.

AI-powered search is transforming not only discovery, but also purchase, with ChatGPT's Instant Checkout and agentic commerce protocol, marking a major step towards agent-led shopping.

With over 700 million people worldwide using ChatGPT for everyday tasks, this latest innovation will enable millions to make purchases directly through the search interface, thanks to partnerships with Shopify and Etsy.

This signals the next wave of commerce as consumers evolve from:

- **Marketplaces (Amazon)**
- **Social commerce (TikTok Shop)**
- **To AI-powered assistants (ChatGPT)**

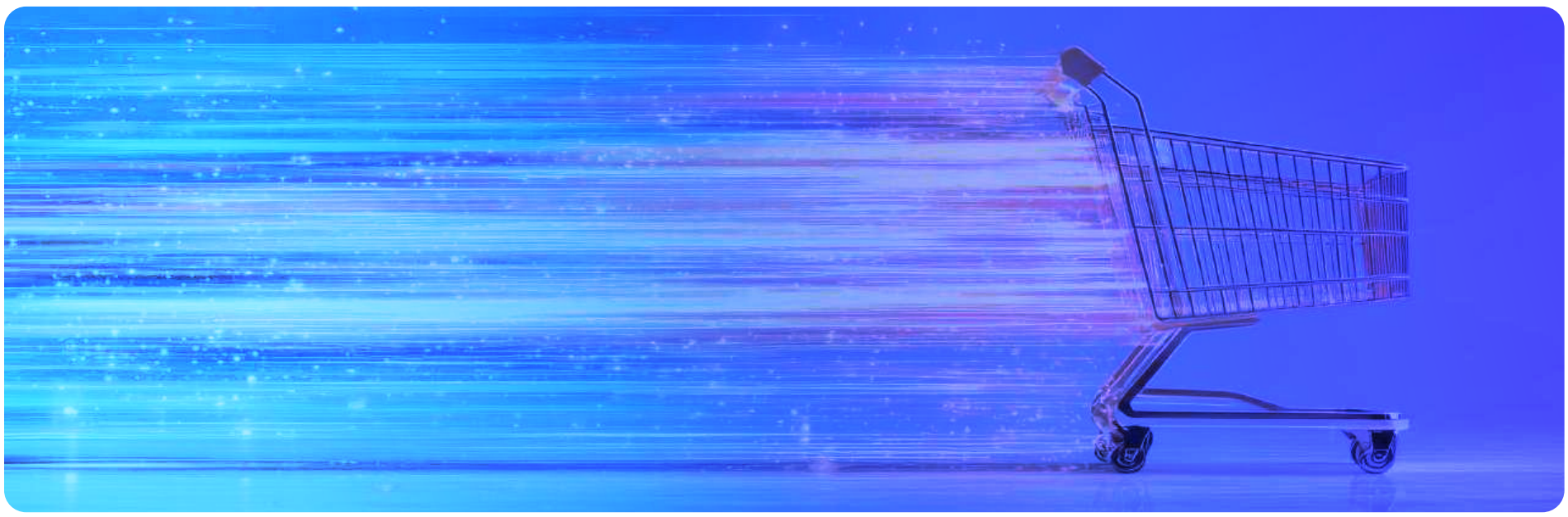
At the same time, the rapid rise of ultra-low-cost marketplaces, such as Temu and Shein, are redefining the economics of ecommerce. **77%** of respondents believe these platforms are fuelling a race to the bottom and lowering their products' price points.

Retailers are also grappling with unprecedented supply chain complexities. Nearly all ecommerce leaders **(94%)** say their strategy has been influenced by global inflation, trade tensions, tariffs, and energy price volatility, leading to a convergence of pressures that is reshaping operational priorities across the board.

In this environment, the mounting pressure that brands are under to maintain brand control and deliver seamless, personalised and scalable ecommerce experiences has never been greater.

Success is no longer defined by simply being online. It's about accelerating growth intelligently in a world shaped by rapid technological change, evolving consumer expectations, and an explosion of digital sales channels.

Brands must now adapt faster, think smarter, and operate with greater precision.
And this is where AI comes into its own.

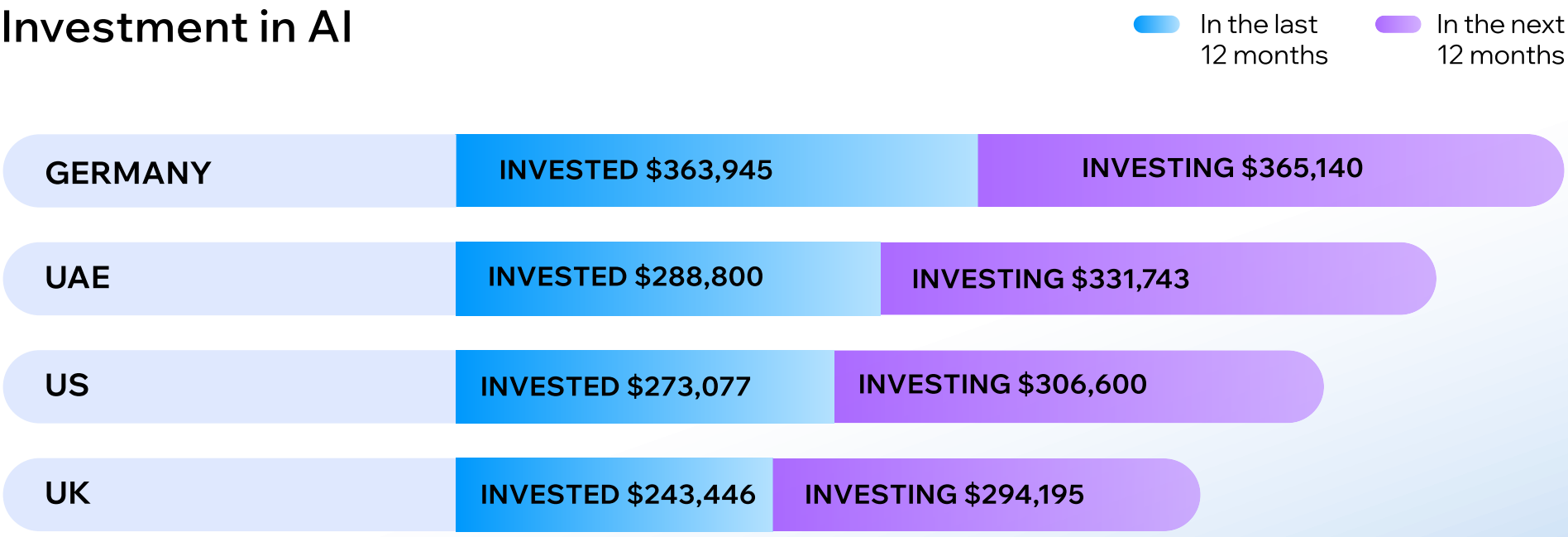


Understanding the new *AI mindset*

The ecommerce industry is at a pivotal moment in its relationship with AI. What started in many organisations as a buzzword has rapidly evolved into a strategic cornerstone of modern commerce.

Across global markets, senior leaders are making a decisive shift from cautious curiosity to confident investment in AI. Over the past 12 months, ecommerce companies globally have invested on average **$291,626 in AI**, and this figure is set to rise to **$323,886** in the coming year. Germany is leading both current and projected spend, signalling a strong national commitment to AI-led transformation.

Investment in AI



However, this surge in investment is not happening in isolation. It is unfolding alongside a wave of regulatory scrutiny and government-led initiatives. 75% of ecommerce organisations globally agree that local government attitudes or regulations have influenced their adoption of AI.

In the UAE, AI is seen as a national priority, with government-backed initiatives accelerating adoption. In the UK and Germany, regulatory frameworks and ethical considerations shape a more measured but increasingly proactive stance. Meanwhile, in the US, the private sector leads, particularly in personalisation and logistics.

This divergence in maturity levels reflects not just regional differences but also varying degrees of organisational readiness and cultural openness to automation and machine-led decision-making.

Yet, a common thread unites these markets: a growing recognition that AI is not just a tool, but a transformative force. Ecommerce leaders are beginning to understand that AI's value lies not in isolated use cases but in its ability to orchestrate intelligence across the entire ecommerce ecosystem, with over a quarter **(29%)** of organisations already viewing AI as a core strategic enabler across the business.

Motivations for adopting AI vary, but the top reasons include:

Enhancing customer experience	Improving operational efficiency	Regulatory or compliance pressures	Staying competitive in the market	To reduce costs
30%	28%	28%	28%	21%

76% of organisations are actively investing in AI to improve decision-making across marketing, logistics and fulfilment, with the

- UK leading at 81%
- Followed by the US at 80%
- UAE at 76%
- Germany lagging at 69%

Interestingly, smaller teams (1–5 people) are investing more in AI (84%) than larger ones (31–35 people), which stand at just 59%, suggesting agility and focus may be driving faster adoption.

Three-quarters of respondents believe their industry will be unrecognisable due to AI in five years, and that AI is strategically important to their growth over the next 12–24 months. This marks a clear shift from experimental to strategic integration.

The conversation is evolving from "Should we use AI?" to "How do we scale it responsibly and competitively?" This shift is critical, as it sets the stage for deeper integration and more ambitious innovation across the entire ecommerce ecosystem.

Breakthroughs at every stage of the *value chain*

From marketing and sales to fulfilment and finance, AI is driving measurable impact across the entire ecommerce ecosystem, enabling brands to operate with greater speed, precision, and adaptability.

This transformation is being driven by mounting pressure to deliver more personalised and scalable ecommerce experiences, something three-quarters **(73%)** of organisations say is now expected of them.

In marketing, generative AI is enabling hyper-personalised content at scale, while predictive analytics optimise campaign performance in real time. These hyper-personalised programmes have been shown to reduce customer acquisition costs by up to as much as 50%.

Sales teams are leveraging AI-driven insights to refine pricing strategies and forecast demand with unprecedented accuracy.

In customer service, conversational AI is reducing resolution times and enhancing satisfaction, freeing human agents to focus on complex, high-value interactions.

But AI's influence extends far beyond the customer-facing front end.

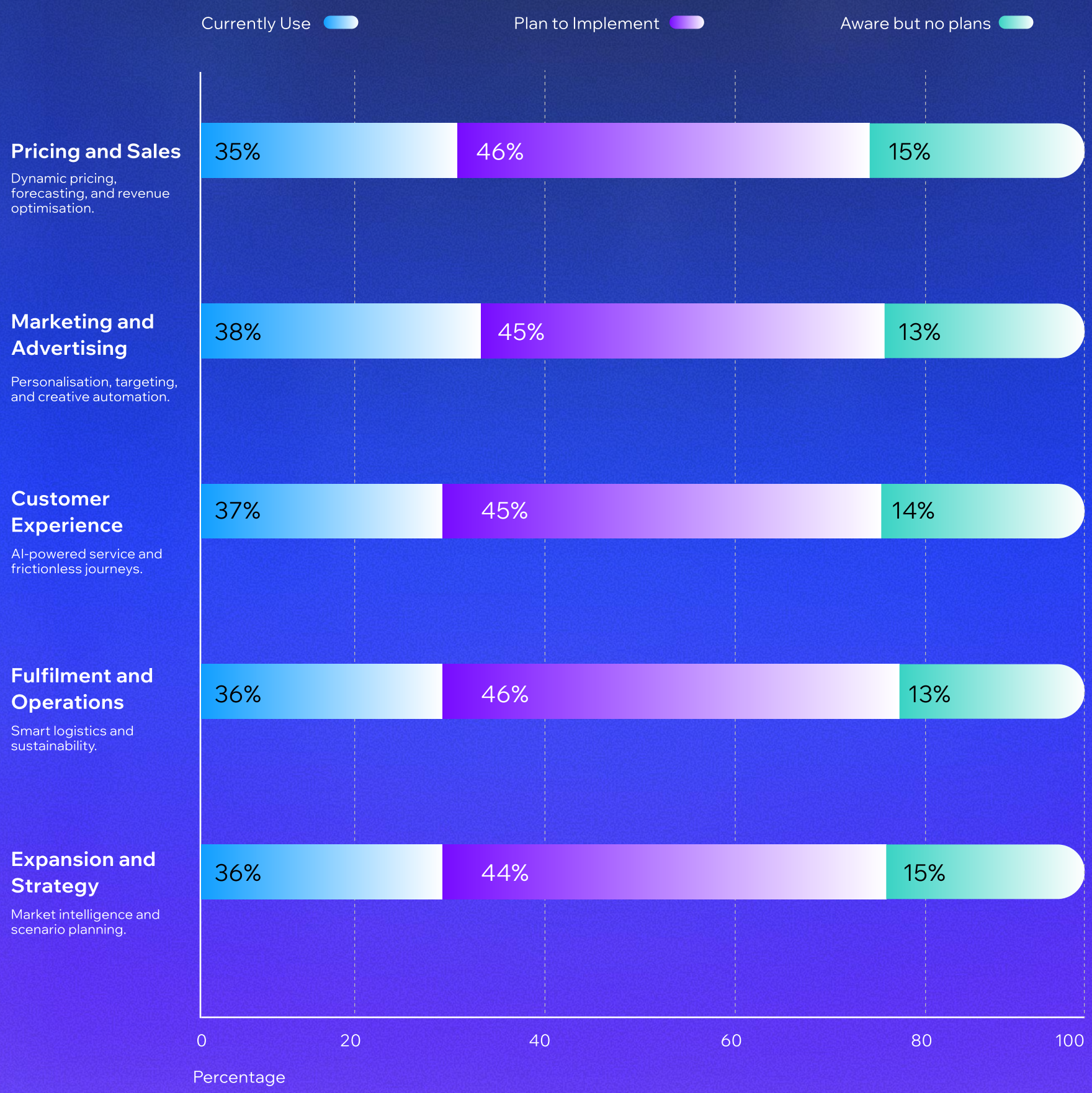
In fulfilment and logistics, AI is powering dynamic routing, warehouse automation, and real-time inventory management, turning fulfilment networks into intelligent, adaptive networks. Finance teams are using AI to detect fraud, streamline reconciliation, and model risk scenarios with greater precision. Even product development is being reshaped, as AI analyses customer feedback and market trends to inform design and innovation cycles.

The result is a more agile, responsive, and data-driven ecommerce enterprise, one where every function is connected through a shared layer of intelligence.

AI is no longer a bolt-on; it sits at the heart of the ecommerce ecosystem

Here's how leading brands across global markets are leveraging AI to drive innovation, streamline operations, and strengthen the bottom line.

AI Adoption in the Ecommerce Value Chain



The Future of Commerce: Powered by AI Agents

AI agents (autonomous systems that act on behalf of customers) are poised to redefine how products are discovered and purchased. From personal shopping assistants to autonomous recommendation engines, these agents will soon become the gatekeepers of commerce.

They interpret natural-language prompts, anticipate intent, compare products across multiple criteria, and even execute purchases autonomously. Post-purchase, they enable predictive reordering and personalised support.

Over half of businesses (**57%)** are exploring use cases for AI agents, and a third **(33%)** are already actively preparing for its rollout.

Sector-specific readiness varies:

Fashion leads with **46%** already prepared for AI agents to become the primary source of customer discovery and purchase, and **44%** of companies are actively exploring use cases.

Brands such as Gensmo are already pioneering multimodal agents that act as always-on style assistants, and the agent's role as a shopping companion is only set to grow.

Beauty shows strong interest, with **59%** exploring use cases but lower readiness, with only **27%** fully prepared for this shift. Some brands are already using AI agents trained on dermatological data and product-specific knowledge to deliver personalised skincare advice.

The introduction of agents is expected to accelerate a shift towards a more consultative ecommerce experience.

Vitamins and supplements are at a similar level of preparedness, with **62%** exploring AI agent use cases and **28%** already prepared.

Similar to beauty, AI agents are being used to personalise supplement recommendations, bridging the gap between ecommerce and wellness consultation.

To succeed in this new reality, brands must shift from solely marketing to the customer to now also optimising for the agent's logic. Trust will be the new currency, and building it depends on transparency, reliability, and alignment (both with consumers and the AI agents that service them).

With Pattern's GEO Scorecard, brands can understand and measure how AI engines perceive their products, ensuring that structured, verifiable data and authentic content are building trust at every digital touchpoint.

Ultimately, brands that design for clarity, consistency, and authenticity will be the ones AI agents choose to trust.

Optimising for AI Search

As AI-powered environments, like search, social and recommendations engines, reshape how consumers find products, brands must rethink how they structure and distribute content.
The benefits of this new type of search are clear:

87% agree that AI-powered search will positively impact their company's sales in the next 12 months.

The US is especially optimistic about this (91%)

UK (87%)

UAE (87%)

GERMANY (87%)

76% of respondents globally agree that AI search platforms have reduced the cost of their customer acquisition.

This has been especially true for smaller ecommerce teams (1-5), with **87%** reporting a reduced cost, compared to **47%** for larger teams (31-35).

Many organisations are confident of the long-term benefit as well, with 75% believing it will still positively impact their sales in the next two years

AI will positively impact sales in the next two years:

Unlike traditional search engines, AI ones prioritise content that demonstrates expertise, authority, and clarity, and is supported by authentic voices such as reviews, testimonials, and community discussions. In practice, this means depth and credibility matter more than volume.

To stay ahead as AI continues to evolve, marketers should future-proof their strategies by:

Regularly auditing how their brand appears in AI-powered environments (tracking not just frequency but also sentiment), and stay up-to-date on AI model updates and best practices

Investing in structured, evergreen content that is comprehensive, factual, and regularly refreshed so AI models can reference it confidently

Building a meaningful presence across platforms where AI sources information, including social, review sites, and forums

Introducing new AI-focused KPIs, such as AI-generated mentions, sentiment and visibility.

Cultivating authentic relationships by partnering with creators and nurturing organic community conversation, as the words of real customers and influencers feed future AI training data

Leadership readiness and *strategic gaps*

As AI becomes embedded across the ecommerce value chain, the spotlight turns to leadership to ensure a smooth and effective rollout. For senior leaders, AI presents both a challenge and an opportunity. When asked where AI will create the most value over the next two years, the top global responses were:

Smart fulfilment and logistics (36%)	Dynamic pricing and sales forecasting (36%)	Trend forecasting and market intelligence (35%)

Regionally, UK leaders called out AI-powered customer service **(41%)** as the biggest opportunity, while US leaders see personalised marketing and advertising **(41%)** as the biggest innovation driver.

However, despite the clear optimism surrounding AI, 73% of organisations feel unprepared for the pace of AI advancement, with concern highest in the UK and US **(76%)**, followed by the UAE **(74%)** and Germany **(65%).**

The top organisational challenges to scaling AI across ecommerce operations were ethical or regulatory concerns (29%), legacy systems and infrastructure (28%) and resistance to change (27%).

In the UK, the biggest organisational barrier is resistance to change	In the US, the biggest barrier is ethical or regulatory concerns	In the UAE, the biggest barrier is the legacy systems and infrastructure	In Germany, unclear KPIs or success metrics is the biggest barrier
32%	35%	28%	26%

Overcoming resistance

To overcome these barriers, education and top-down advocacy are key. Leaders must champion AI adoption not just as a technical upgrade, but as a strategic imperative, embedding its value across teams and functions. Ultimately, AI success starts with leadership clarity. Organisations that align around shared goals, invest in education, and build cross-functional collaboration will be best positioned to turn AI from a challenge into a competitive advantage.

Strategic Opportunities in the AI Era

The AI advantage is no longer optional; it's foundational. For ecommerce leaders, the path forward lies in embracing AI not just as a tool, but as a strategic capability that sits in every aspect of the ecommerce value chain, powering every decision, experience, and opportunity for growth.

To stay ahead and maintain the competitive advantage AI offers, successful e-commerce leaders should look to:

- Harness AI-driven insights from marketing through fulfilment to set a new standard for seamless ecommerce operations and continuous improvement across the entire ecommerce ecosystem.
- Leverage data as a strategic asset, enabling confident, accelerated decision-making and bringing new ideas to life.
- Build intelligent, adaptive fulfilment networks that anticipate change and turn disruption into opportunity.
- Foster a culture of responsible innovation, earning enduring trust and inspiring positive change worldwide.

But brands don't have to build this alone. That's where Pattern comes in. Pattern provides the AI tools, infrastructure, and expertise to help brands win, so they can focus on creating great products that delight customers. From intelligent fulfilment and dynamic pricing to AI-powered content optimisation and marketplace strategy. Pattern takes on the complexity of ecommerce and AI integration, enabling brands to scale faster, smarter, and more profitably. The future of ecommerce belongs to those who lead with intelligence. With Pattern, brands gain a partner that builds the systems, so they can build the brand.

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Pattern accelerates brands on global ecommerce marketplaces leveraging proprietary technology and AI. Utilising more than 46 trillion data points, sophisticated machine learning and AI models, Pattern optimises and automates all levers of ecommerce growth for global brands, including advertising, content management, logistics and fulfilment, pricing, forecasting and customer service. Hundreds of global brands depend on Pattern's ecommerce acceleration platform every day to drive profitable revenue growth across 60+ global marketplaces — including Amazon, Walmart.com, Target.com, eBay, Allegro, Media Markt, and Otto. To learn more, visit pattern.com or email press@pattern.com.

Want to discover what an
ecommerce accelerator can do for you?

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