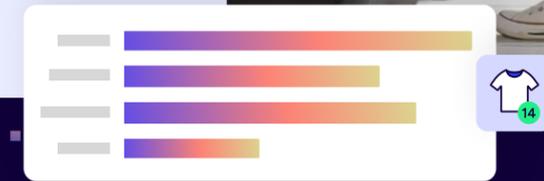
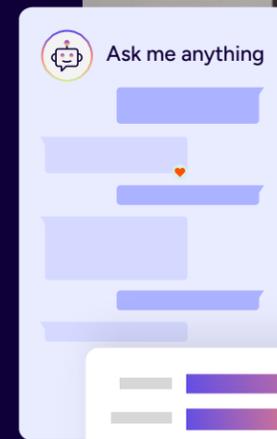


Ecommerce Delivery Benchmark Report 2026

Navigating AI-assisted
commerce



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Methodology

This report draws insights from consumer surveys conducted in November 2025, involving 8,000 nationally representative respondents across eight key markets: the U.K., U.S., Canada, Australia, Germany, France, Italy, and Spain. Additionally, a B2B survey gathered responses from 400 senior decision-makers at ecommerce businesses with a turnover of \$12.5 million or more.

Participants total
8,000+



U.S.



U.K.



Canada



Australia



France



Germany



Italy



Spain



Introduction

For the first time in ecommerce's history, retail brands are no longer competing solely for human attention. Machines and algorithms are shaping how products are discovered, compared, and shortlisted—redefining the path to purchase. The pace of AI adoption has been swift, and the implications for retailers are becoming increasingly difficult to ignore.

Artificial intelligence is rapidly transitioning from experimentation to everyday use at a time when consumer expectations for convenience, reliability, and value continue to rise. As AI begins to influence more stages of the ecommerce journey, retailers are being tested on whether or not their operating models and delivery networks are fit for a more automated environment.

For retail brands, this moment presents a clear opportunity. Applying AI in practical ways, strengthening delivery performance, and building more connected, data-led ecosystems can unlock efficiency, resilience, and differentiation. In a market where automated systems mediate discovery and choice, these capabilities help retailers remain visible, trusted, and easy to transact across AI-assisted journeys.

Drawing on insights from consumers and senior retail decision-makers, this report examines how ecommerce is evolving in the age of AI. It explores shifting competitive dynamics, the growing influence of AI on shopper behaviour and delivery choices, and the strategic priorities businesses must focus on to build readiness and sustain performance.



This report is divided into three key sections:

1 | Ecommerce in 2026: Smarter Competition in the Age of AI

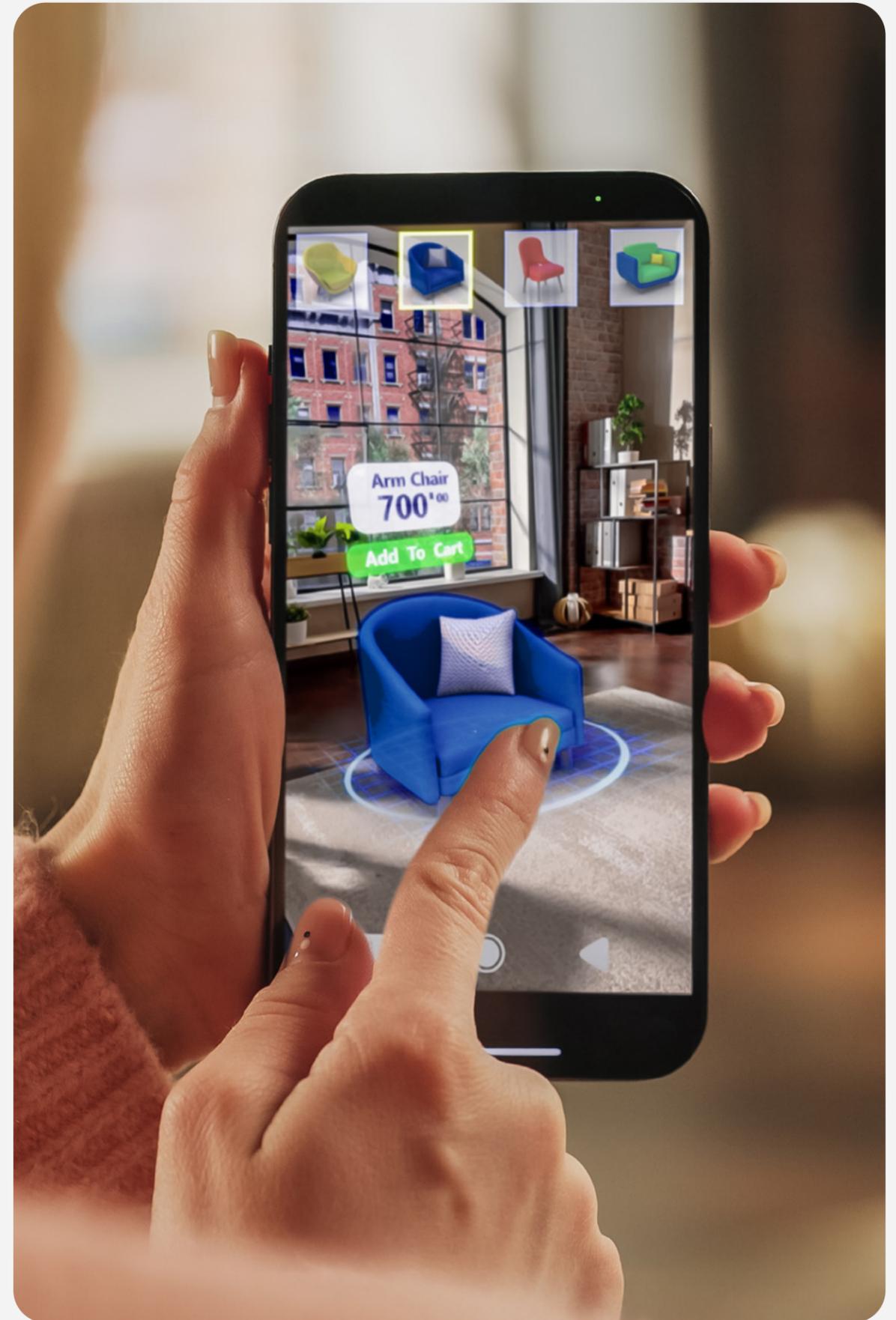
2 | From Discovery to Delivery: How AI is Transforming Ecommerce

3 | Building AI Readiness: Actionable Steps for Retailers

SECTION I

Ecommerce in 2026: Smarter Competition in the Age of AI

Ecommerce in 2026 sits at a point of rapid convergence. Growth remains the goal, but the conditions for achieving it are shifting fast as competition intensifies, expectations rise, and the paths to demand and fulfilment grow more complex.



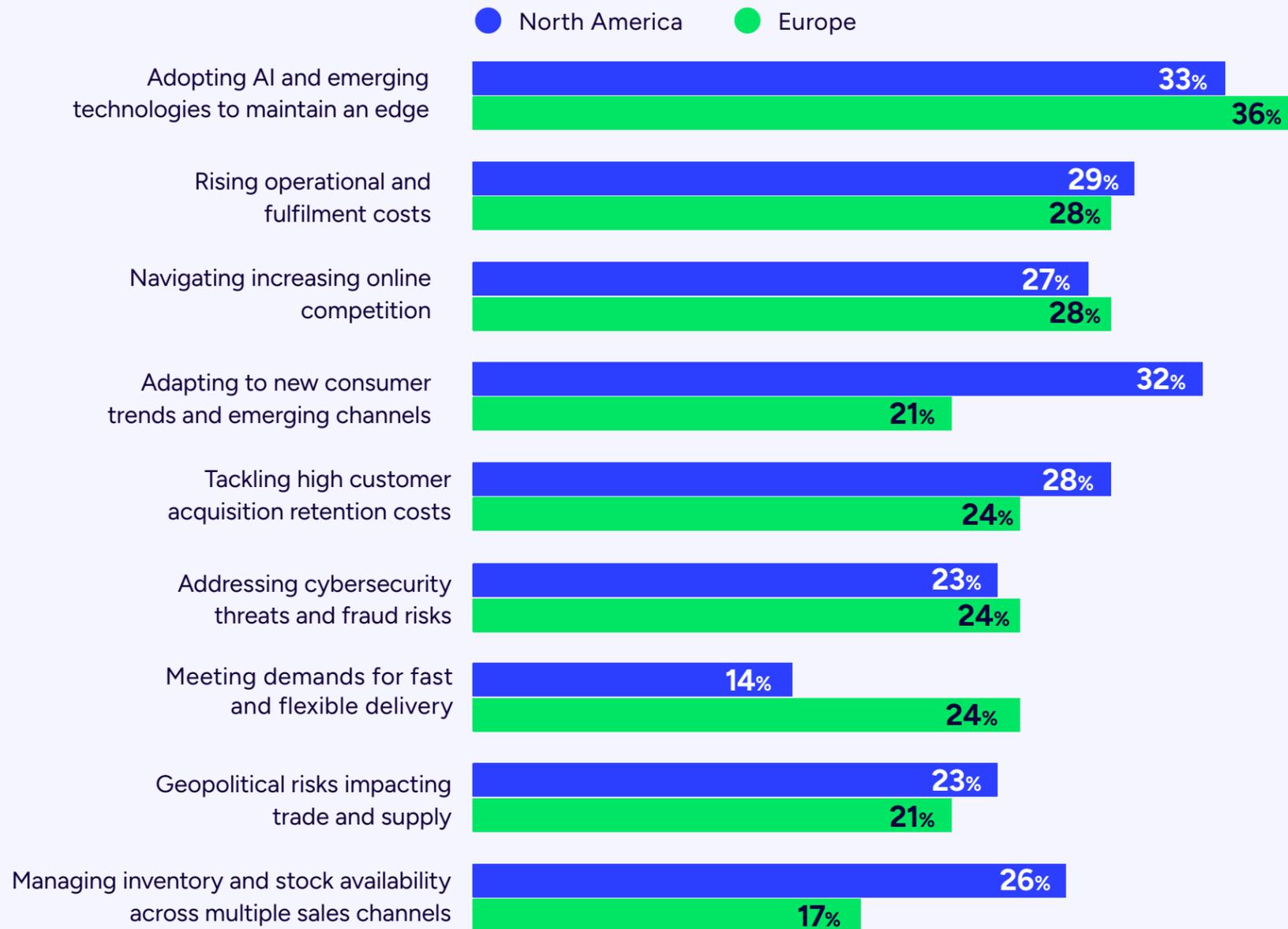
Ecommerce in 2026 is at a moment of rapid convergence. Growth remains the objective, but the conditions under which it's achieved are shifting fast. Competition is intensifying, consumer expectations are higher than ever, and the way demand is created, influenced, and fulfilled is becoming more complex. Retailers are not responding to a single structural change, but to multiple forces interacting at pace.

When retailers were asked which factors are most likely to impact business performance in 2026, **adopting AI and new technologies came out on top** (Fig 1). This reflects both the rapid advancement of AI capabilities and the significant scale of change that retailers are navigating.

Most retailers recognise the opportunity AI presents. However, **they also recognise the pace and complexity involved for successful implementation.** Integrating new capabilities into existing platforms, getting data-ready, and managing cultural change requires focus and investment.

Fig 1: Retailers see scaling AI and digital capabilities as critical to staying ahead

What do you anticipate as the main challenges to your business performance in 2026?



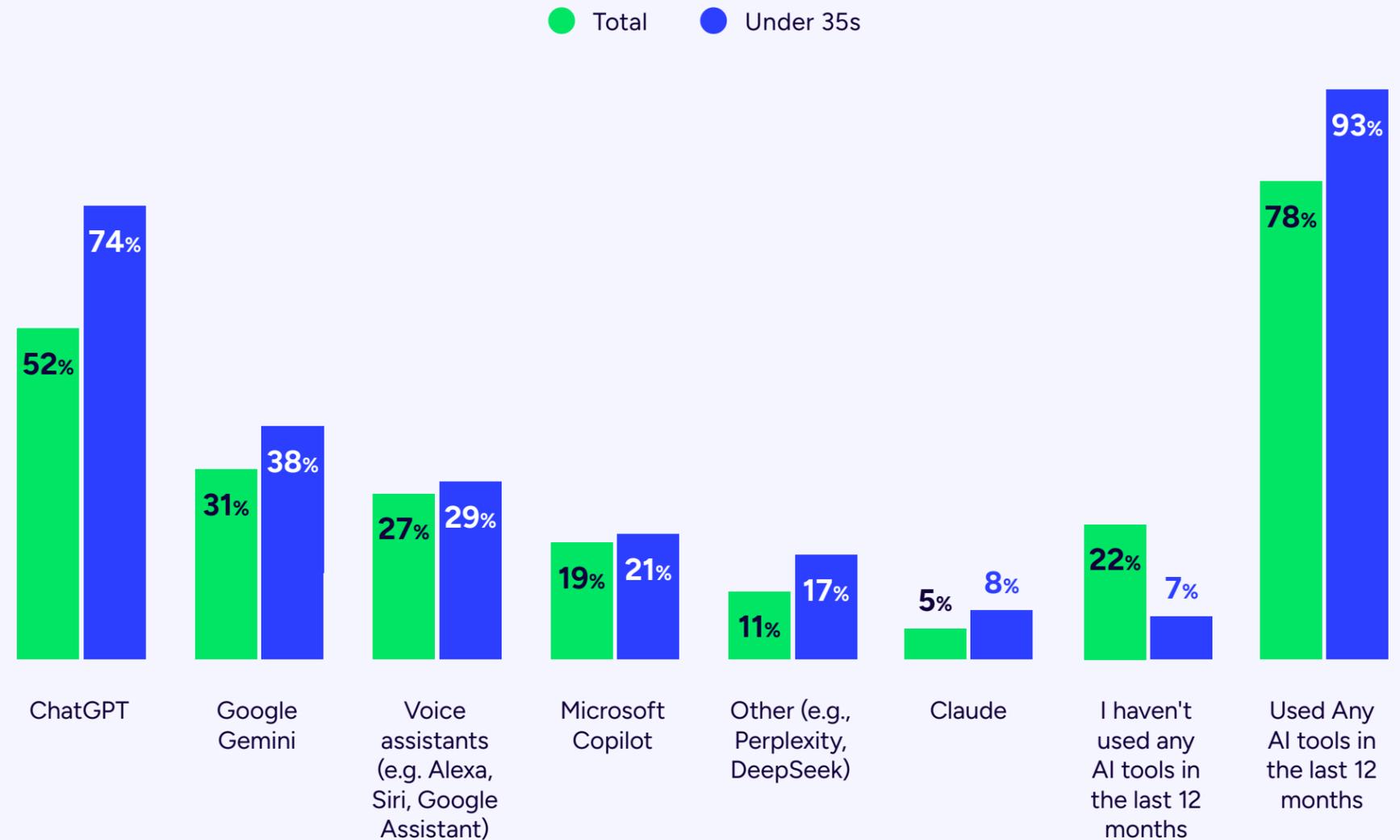
Source: Retail Economics, Metapack, 2026

The rise of generative AI

Over the past 12 months, **generative AI has progressed rapidly from experimentation to everyday use**. Tools such as ChatGPT, Google Gemini, and AI-enabled search engines now influence how consumers research, plan tasks, and make decisions. This shift has been relatively seamless due to the ease of using AI, which doesn't require technical skill. In fact, AI assistants are increasingly used by default, having been integrated into existing platforms (Fig 2).

Fig 2: ChatGPT leads the AI assistant charge

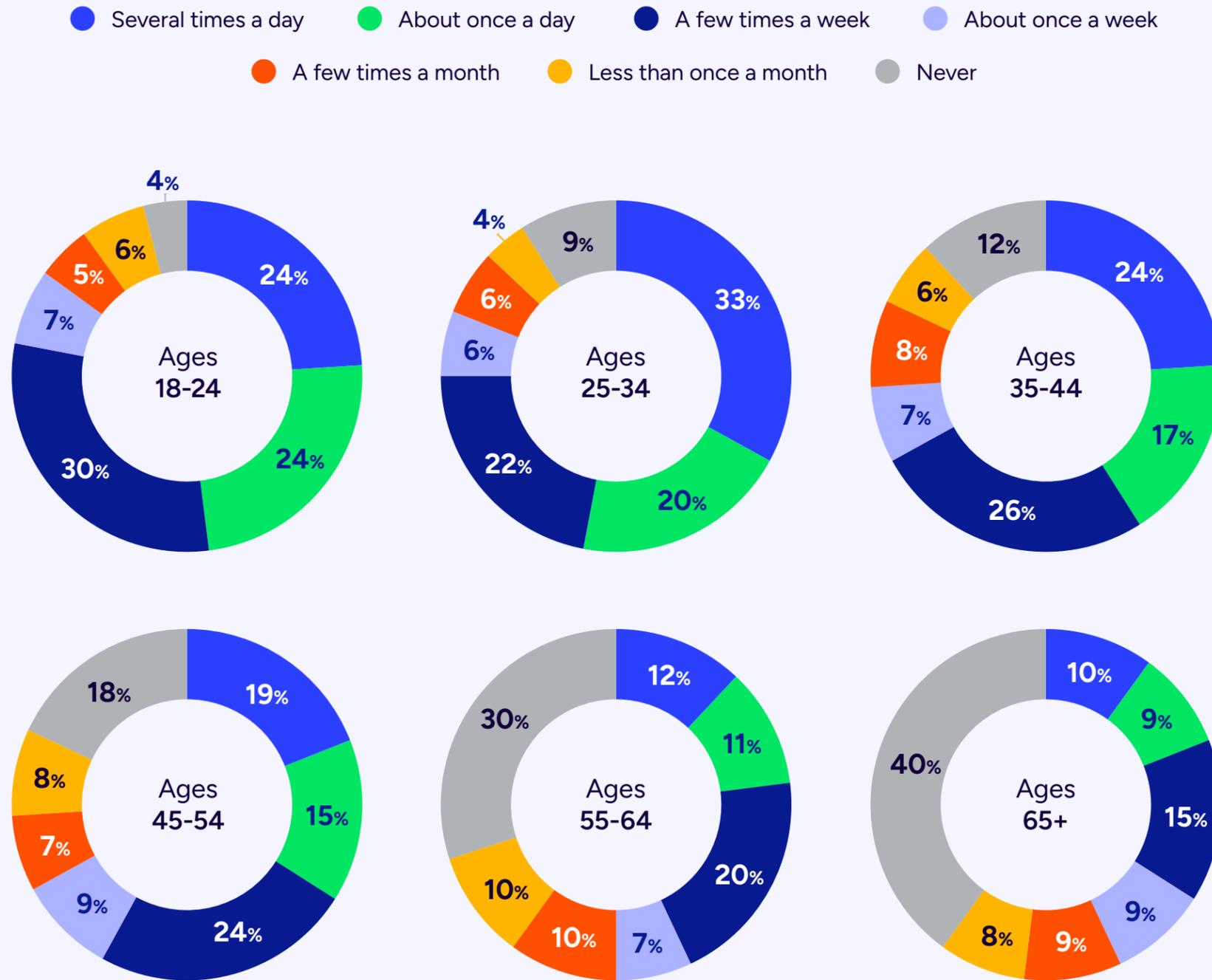
In the last 12 months, which of the following AI tools or assistants have you used, if any?



Source: Retail Economics, Metapack, 2026

Fig 3: Accelerated uptake: Half of under-35s use AI assistants daily

How often, if at all, do you personally use AI tools or assistants for any purpose?



Source: Retail Economics, Metapack, 2026

Furthermore, consumers are turning to conversational tools, voice assistants, and early agentic systems that interpret intent and narrow choices on their behalf. **Nearly 80% of consumers have utilised a generative AI assistant in the past year**, with adoption rates rising to near-universal among those under the age of 35. Even among older age groups, 59% report having tried AI tools, underscoring the rapid pace of mainstream adoption (Fig 3).

As consumers become normalised to AI summarising information, narrowing options, and reducing effort in everyday life, they increasingly carry those expectations into shopping contexts. Today, generative AI is becoming a standard interface for navigating life's complexities and making commerce-related decisions.

From AI assistance to agentic commerce

Agentic commerce is a retail model where autonomous AI agents act on behalf of consumers, managing the full purchasing lifecycle. Decisions are guided by user-defined preferences, constraints, and trust signals, reducing the need for direct human interaction at each step.

Its evolution can be broadly framed within four key stages (Fig 4). Currently, most retail use cases fall under 'AI-assisted commerce,' where it plays a more supportive role, but control remains with the consumer. However, in 2026, we're now moving into the 'Semi-autonomous agents' stage.

Fig 4: The evolution of agentic commerce



AI-assisted vs. Agentic commerce

AI-assisted commerce supports discovery, comparison, and evaluation while keeping the shopper in control. Agentic commerce takes it a step further, allowing AI to act on a shopper's behalf for predefined tasks based on preset preferences and approvals.

AI systems don't replace ecommerce, they extend it. Currently, agentic commerce is evolving from AI-assisted

journeys as consumers grow more comfortable delegating decisions. For shoppers, this reduces friction and decision fatigue. For brands, it presents both advantages and disadvantages, as algorithms increasingly determine which products are surfaced. Visibility within AI-driven discovery becomes critical, requiring retailers to adapt product information, search descriptions, and metadata to remain relevant in an agent-led environment.

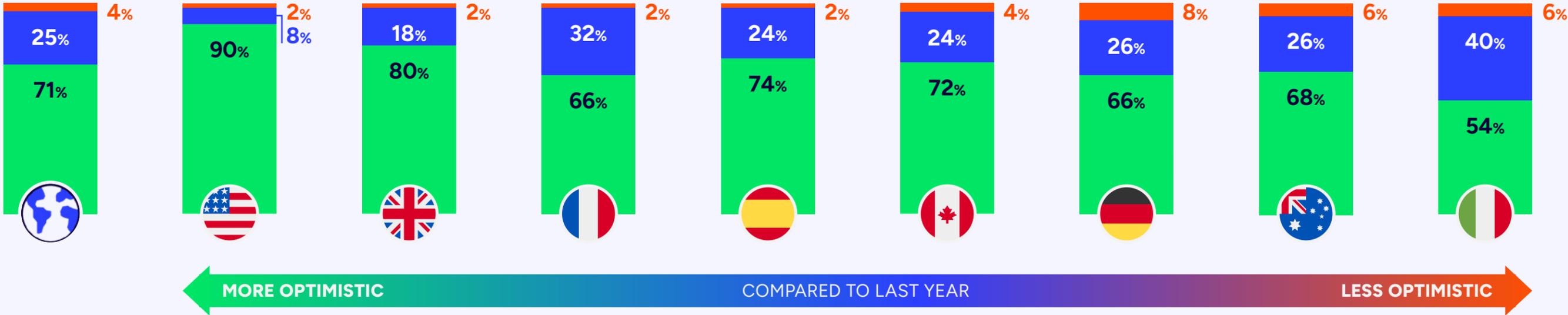
Outlook for 2026: Growth ambitions meet rising delivery expectations

In 2026, retailers remain broadly optimistic about ecommerce growth, but operate in a market where execution matters more than ever. **Seven in ten retailers expect online sales growth to strengthen over the next year**, with the highest confidence in the U.S., U.K., Spain, and Canada (Fig 5).

Fig 5: 2026 ecommerce growth expectations vary by market

Based on your current strategy and market conditions, how do you expect your online sales growth to compare in 2026?

● Higher growth ● About the same ● Lower growth

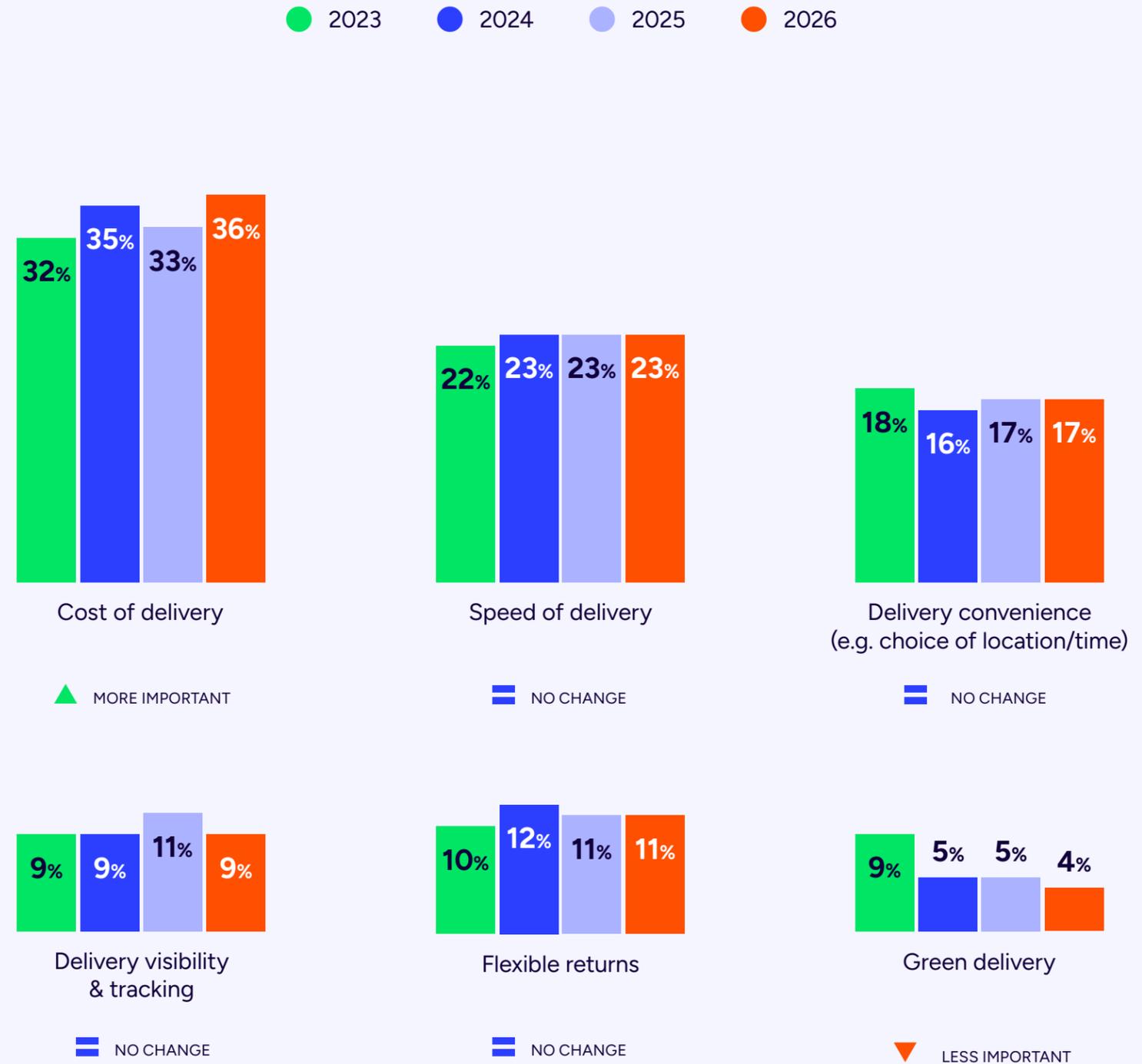


Source: Retail Economics, Metapack, 2026

Since 2023, **delivery cost has become a more prominent driver** of choice, reflecting a value-conscious shopper mindset in an environment of easy comparison and abundant choice (Fig 6).

Crucially, greater price sensitivity has not translated into lower service expectations. Delivery speed is now widely regarded as a baseline requirement, rather than a differentiator. In North America and Europe, **over half of consumers expect a standard online order to arrive within two days**. This expectation has remained elevated, even in markets where cost-of-living pressures persist.

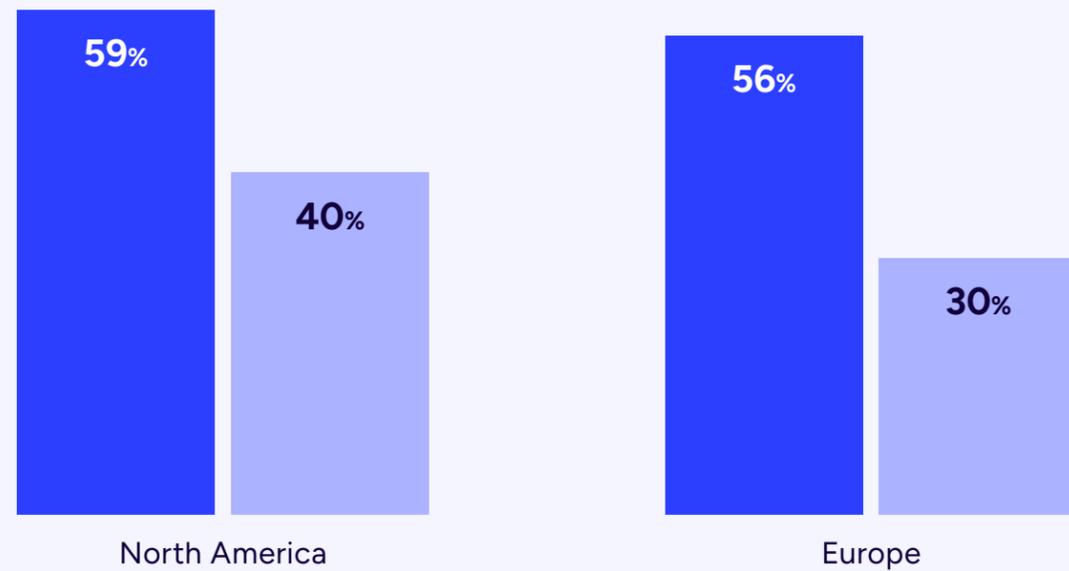
Fig 6: Rising cost sensitivity is reshaping delivery priorities
What is the most important aspect of the online delivery experience?



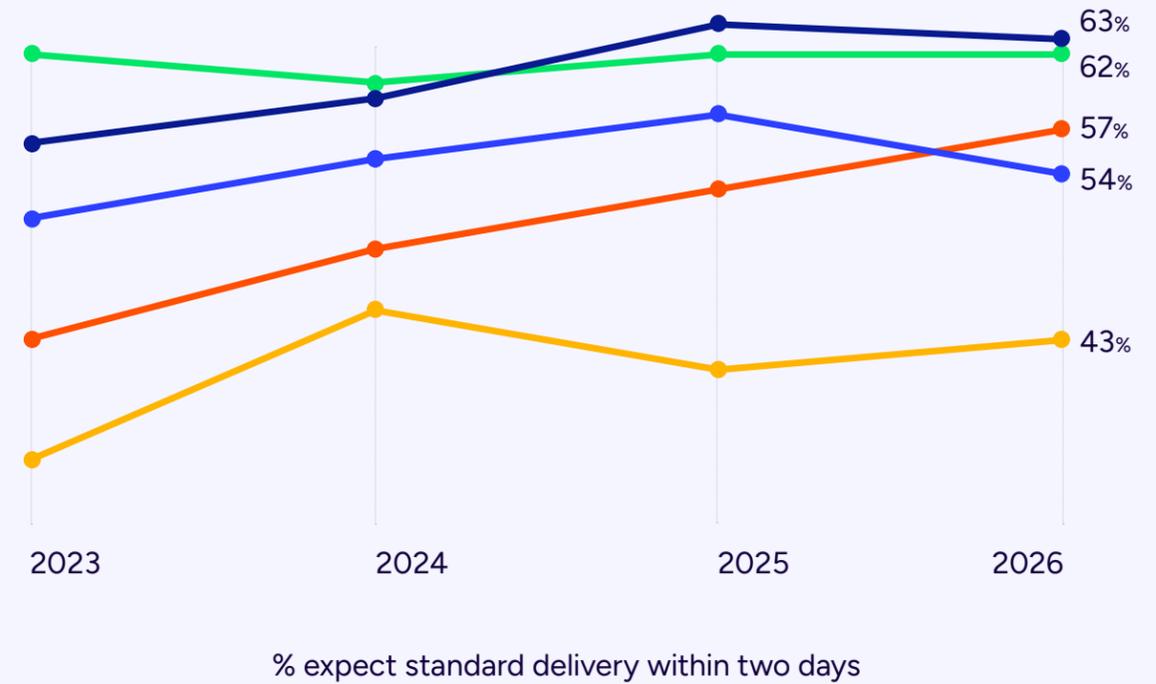
Source: Retail Economics, Metapack, 2026

Fig 7: Fast delivery is now a baseline expectation

How quickly do you expect a typical online order to arrive (without paying extra for shipping)



● % of consumers that expect delivery within two days as standard
● % of retailers that deliver within two days as standard



● U.S. ● U.K. ● Canada ● Australia ● EU-4

Source: Retail Economics, Metapack, 2026

However, delivery capability has not kept pace evenly. A clear gap remains between consumer expectations and current provision, most notably in Europe, where fewer retailers offer two-day delivery as standard (Fig 7).

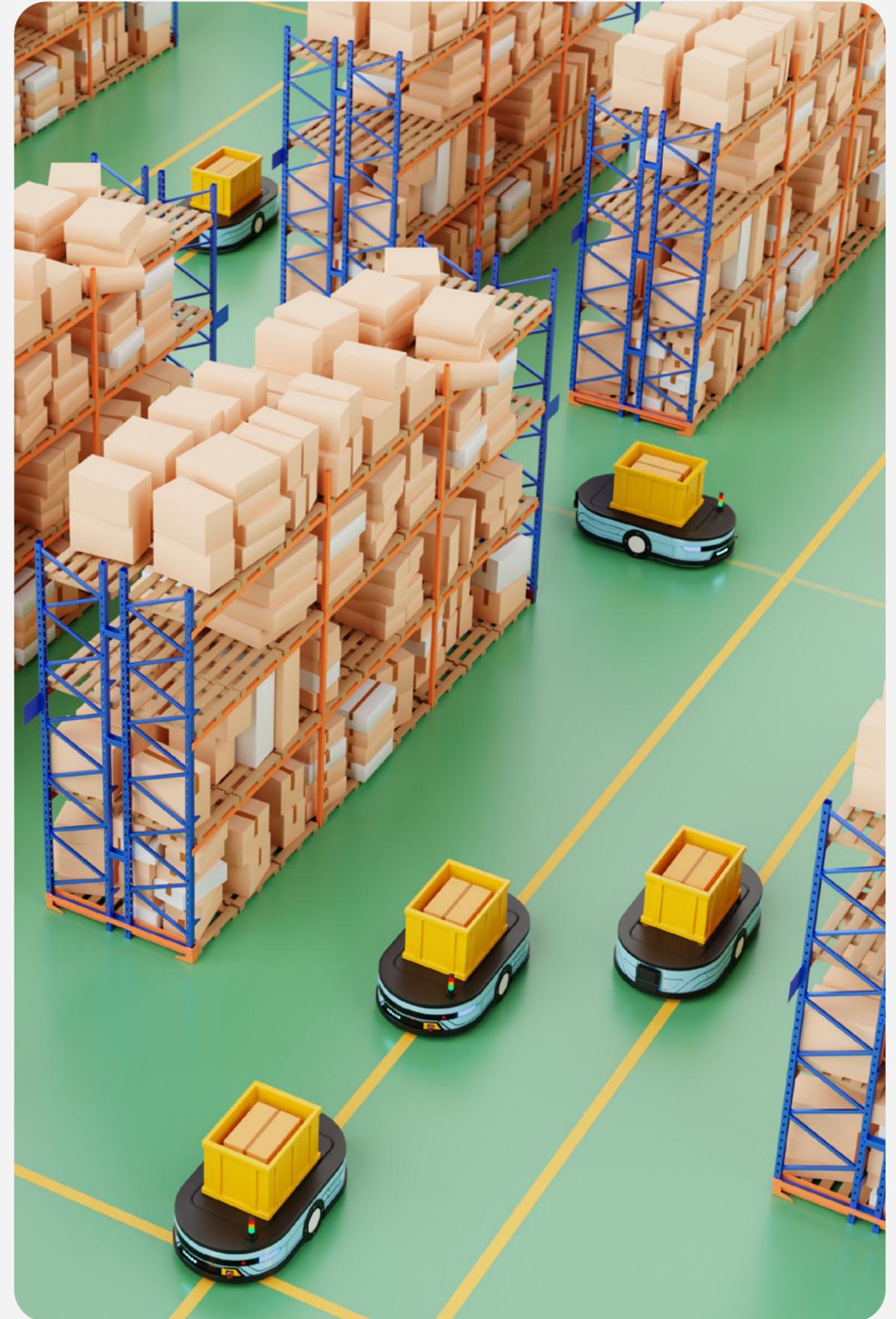
Consumers expect delivery to be fast, flexible, and low-cost, even as retailers contend with elevated fulfilment costs and last-mile complexity.

In 2026 and beyond, AI will play a central role in helping retailers balance these demands more effectively, enabling better decision-making across delivery and fulfilment. As a result, delivery performance is becoming more influential, shaping how both consumers and algorithms identify which retailers are best placed to meet their needs.

SECTION II

From Discovery to Delivery: How AI is Transforming Ecommerce

This section explores five themes reshaping ecommerce and delivery as AI begins to influence how demand is formed, decisions are made, and experiences are delivered.



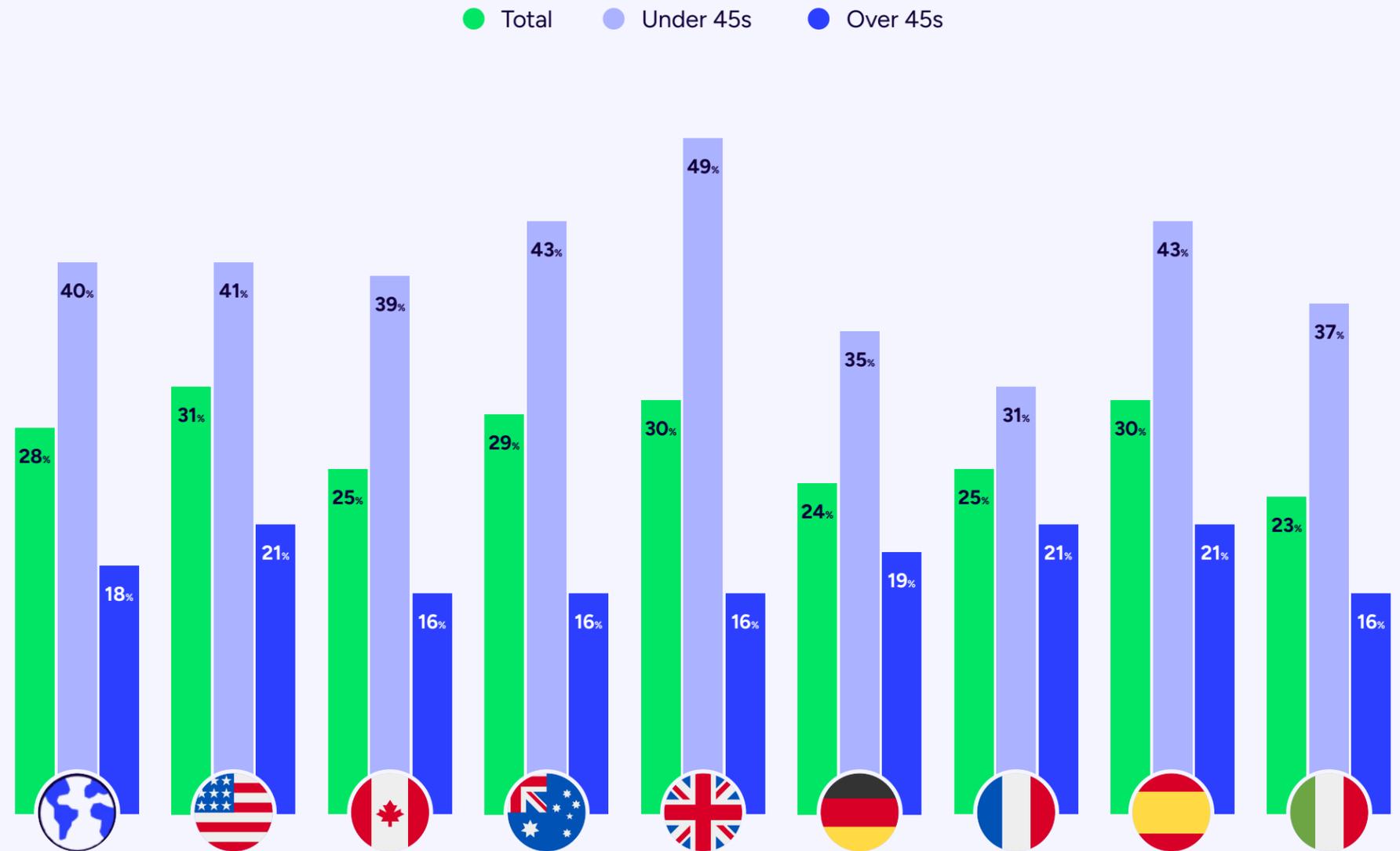
The emergence of AI-mediated shopping journeys

More than a quarter (28%) consumers have used chat-based AI tools for shopping-related tasks within the past 12 months, rising to 40% among those under 45 (Fig 8). In the U.S., over 82 million consumers have used chat-based AI tools such as ChatGPT as part of their online shopping.

Consumers are intentionally using AI with defined objectives. For example, shoppers are using AI for pre-purchase retail tasks, including checking product availability and understanding delivery and return options. Traditionally, this would be conducted via retailer websites, comparison sites, and search engines. Now with AI, it's in a single, conversational environment.

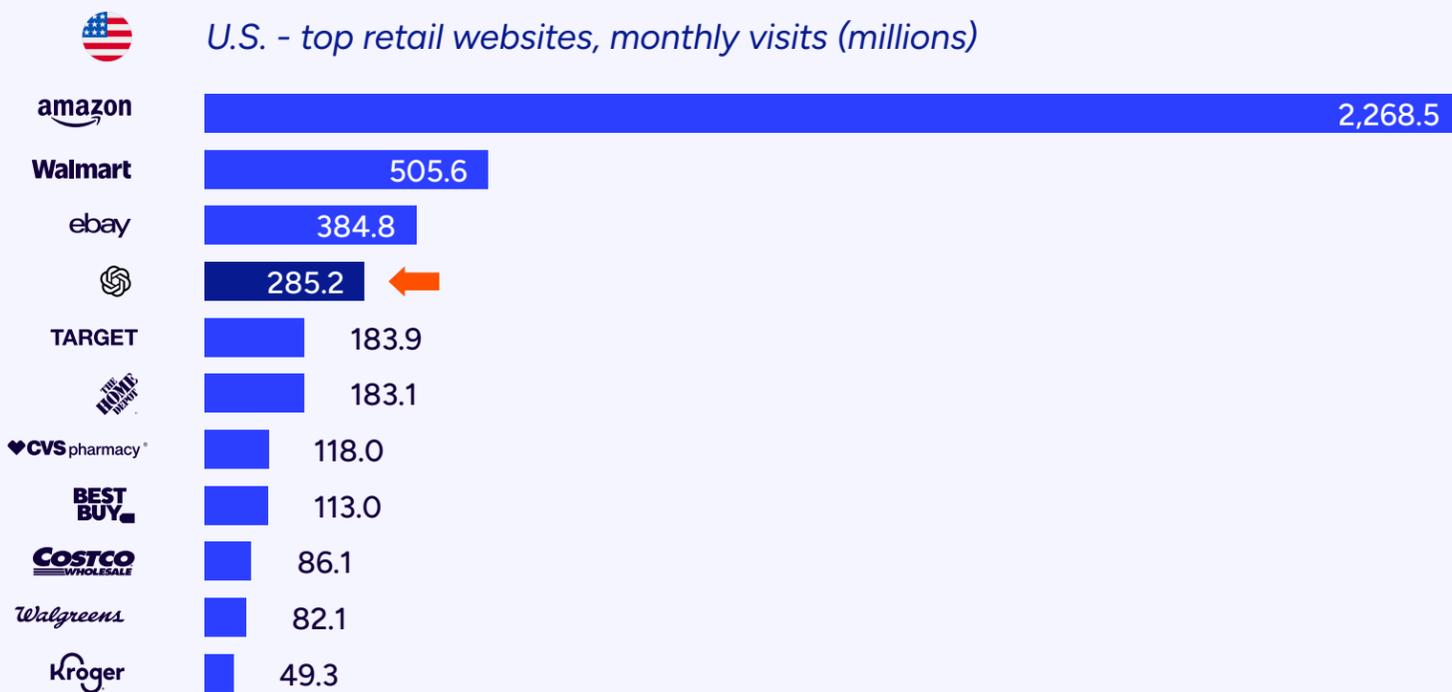
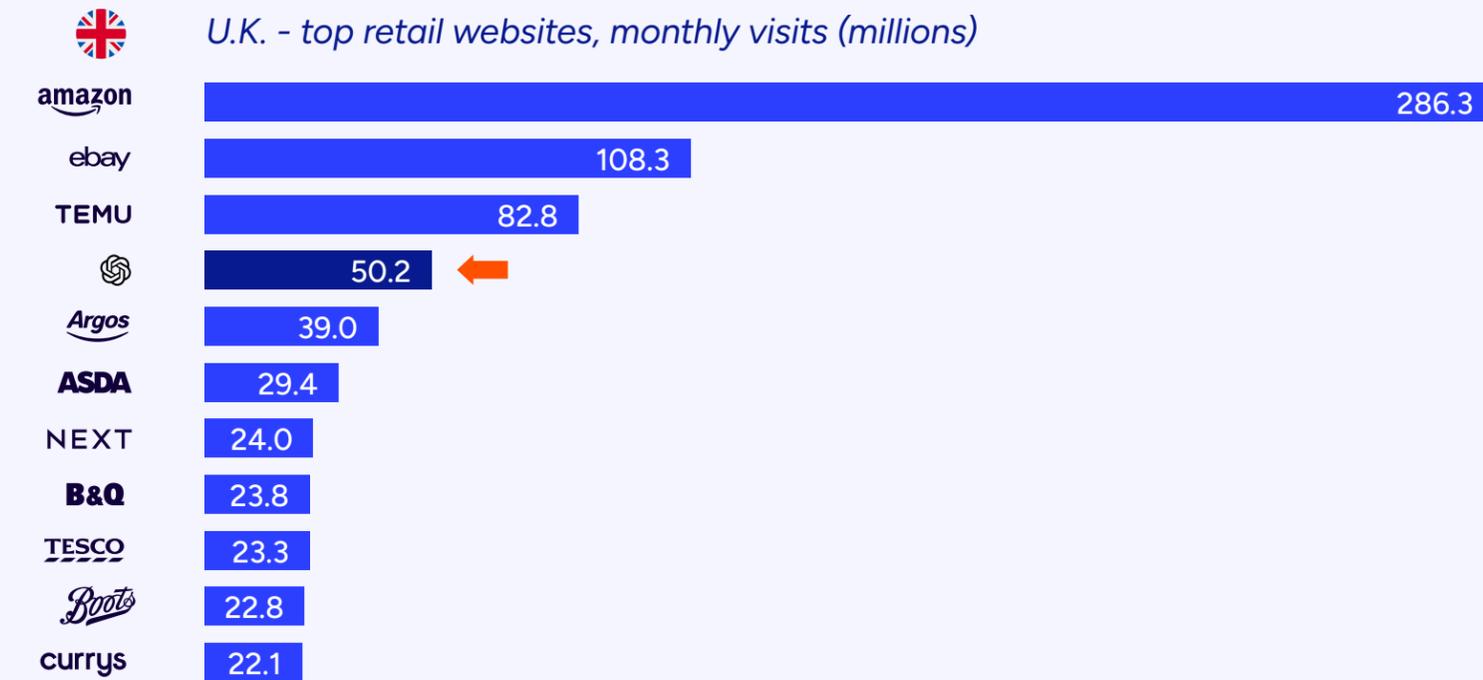
Fig 8: Chat-based AI is already part of the shopping journey

Share of consumers using chat-based AI tools for shopping-related tasks, total and by age



Source: Retail Economics, Metapack, 2026

Fig 9: ChatGPT now generates retail-intent traffic comparable to leading retail websites in the U.K. and U.S.



Source: Retail Economics, Semrush. Retail-intent traffic for ChatGPT is estimated using a six-month rolling average of site visits (June to November 2025), adjusted for the share of survey respondents who said they use ChatGPT for shopping tasks over the same period.

The scale of this shift becomes clearest when looking at traffic patterns. **ChatGPT is already generating retail-related traffic volumes comparable to the largest ecommerce websites** (Fig 9). It consistently ranks within the top five retail destinations for retail-intent activity.

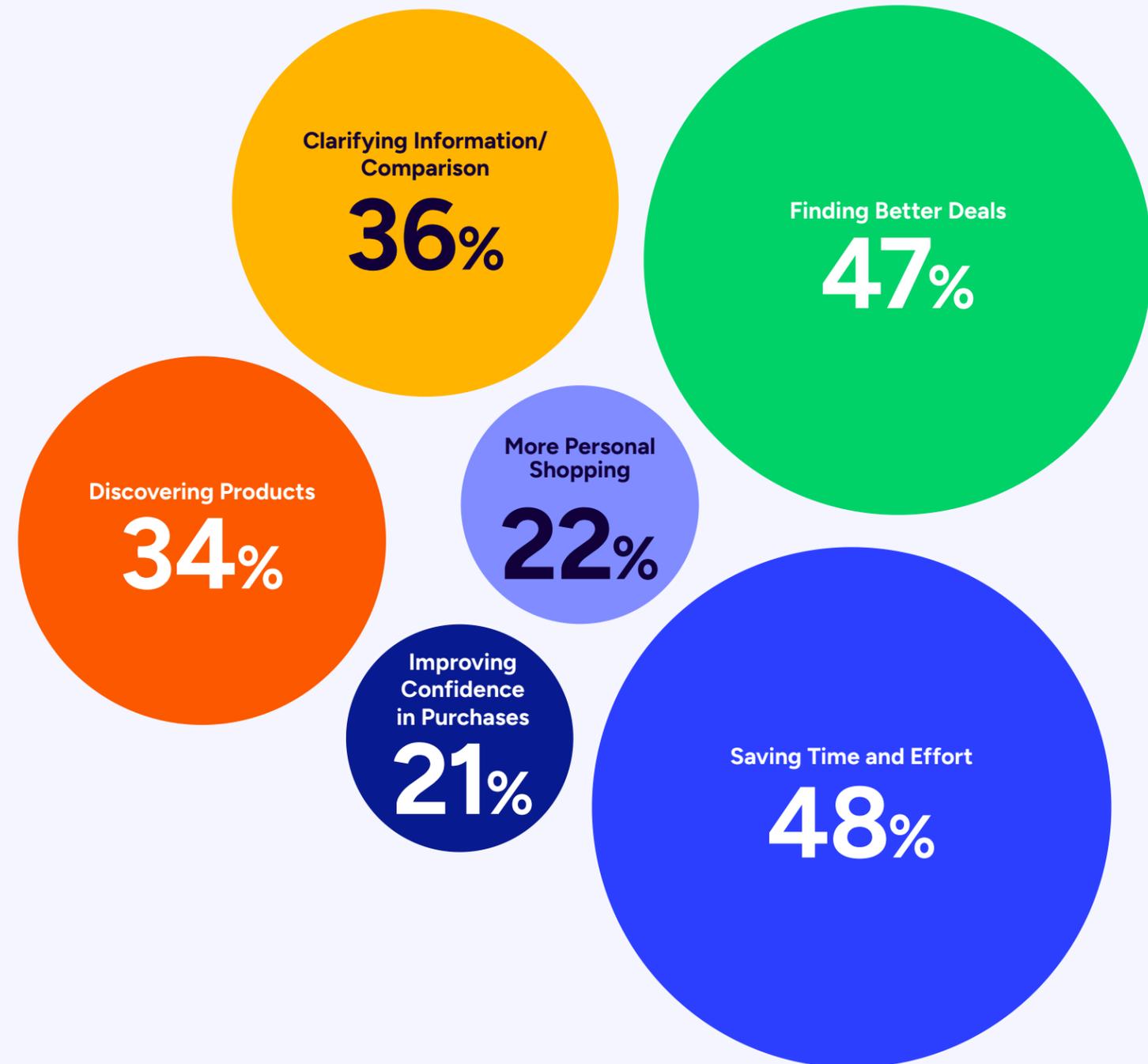
This insight suggests a structural shift in the origin of consumer attention. Increasingly, discovery is occurring through AI interfaces rather than retailer-owned platforms.

Consumers are using AI for practical, task-led reasons, including saving time, comparing options, and accessing upfront information on price, availability, and delivery or returns—enabling faster and more confident decisions (Fig 10).

The customer journey will not disappear, but **the points at which consumers form preferences and narrow choices are shifting.** Success increasingly depends on whether products, prices, and propositions are visible, competitive, and easy to transact with within AI-mediated environments.

Fig 10: Top perceived benefits of using AI assistants for online shopping

What do you feel are the biggest benefits of using AI tools or assistants for online shopping?



Source: Retail Economics, Metapack, 2026

Consumers want AI help, not AI control

Consumers are increasingly open to incorporating AI into their shopping experiences, but in a defined and controlled way. Overall, **six in ten consumers are comfortable using AI assistants in the ecommerce journey**, with adoption currently focused on support rather than full delegation.

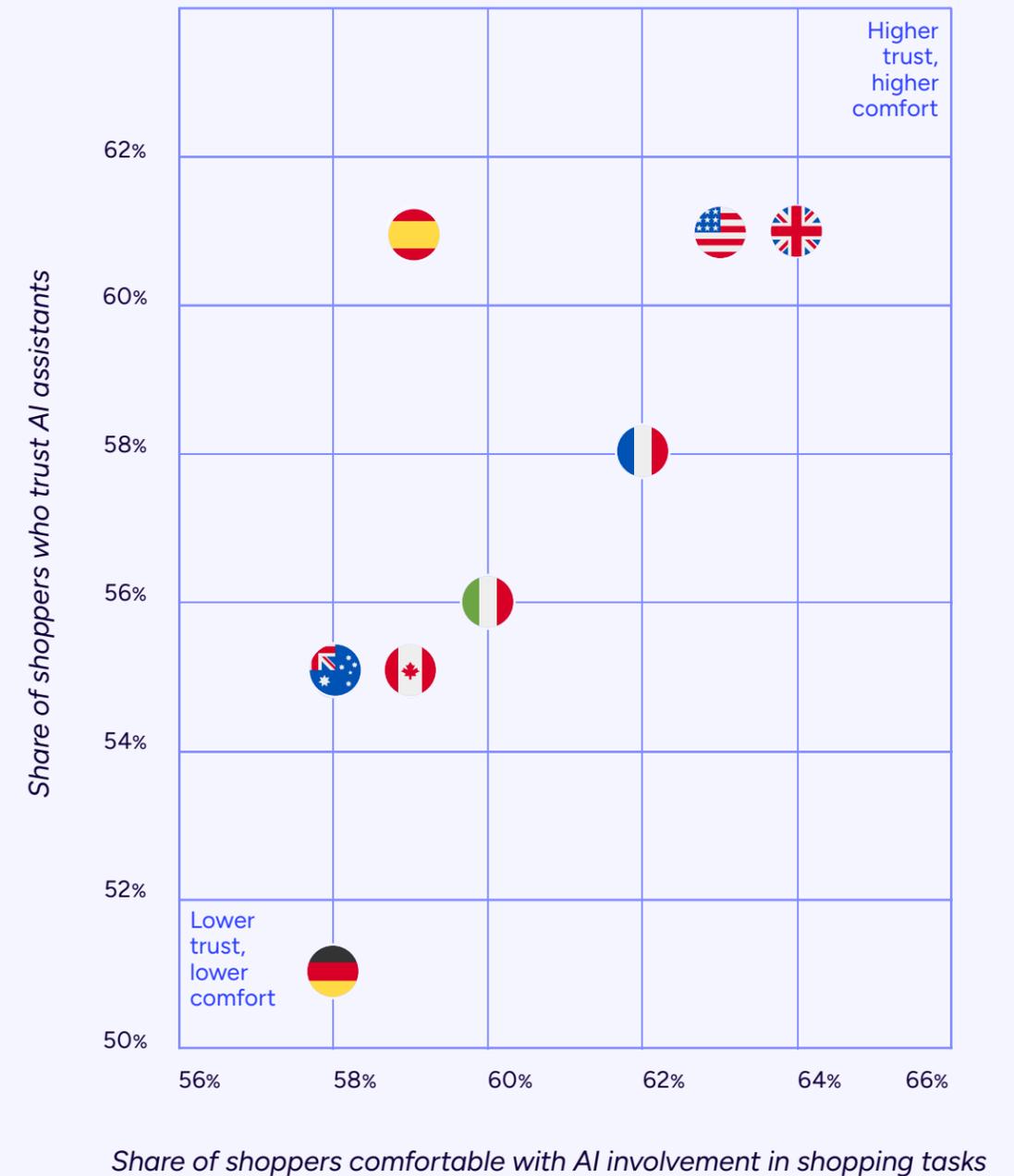
The most common use case is AI-led recommendation and shortlisting. Around a third of shoppers are happy for AI to narrow options while retaining final control themselves. Smaller but meaningful shares are open to deeper involvement, including AI completing purchases with approval (16%) or managing repeat or

trusted re-orders (12%). At the same time, a sizeable minority still prefers no AI involvement, underscoring that adoption remains selective and incremental.

Trust and comfort with AI vary across markets and product categories (Figs 11 and 12). Higher levels of online maturity and earlier exposure to AI-enabled tools are associated with greater openness to AI involvement, reflecting consumers' familiarity with making complex decisions digitally. Where adoption has been slower, comfort levels are more cautious, particularly for purchases that are more tactile or emotionally driven.

Fig 11: The U.S. and U.K. show the greatest level of trust and comfort with AI-driven commerce

Trust and comfort with AI vary by market



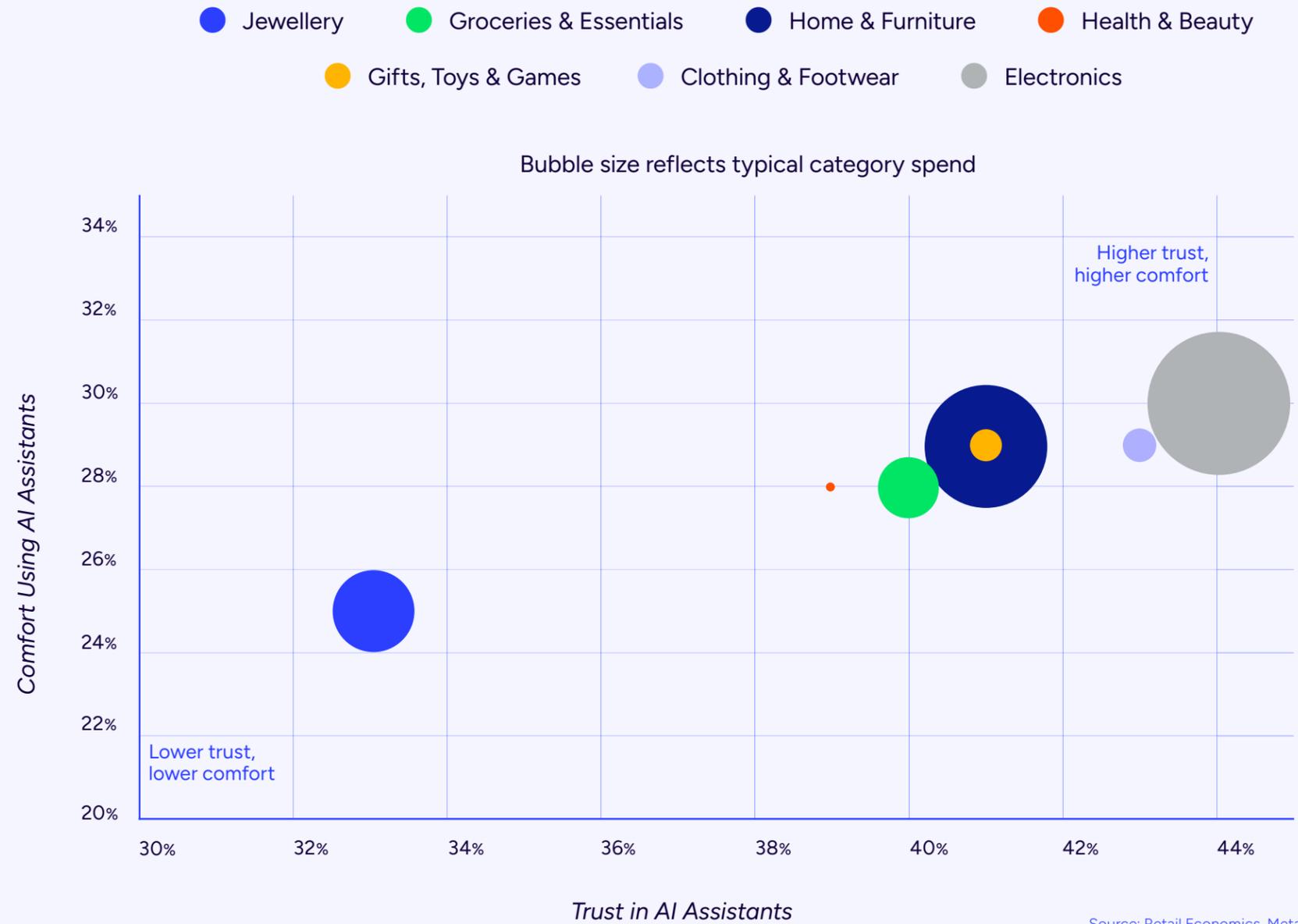
Source: Retail Economics, Metapack, 2026

This pattern is visible at the category level. Openness to AI is highest in electronics, where it helps consumers navigate technical specifications and trade-offs, and in clothing and footwear, where large assortments and search fatigue make AI-led shortlisting particularly valuable.

By contrast, groceries and health & beauty remain more bounded by habitual buying and brand familiarity, limiting the perceived need for AI involvement. Jewellery is the most cautious category, reflecting the high-consideration and personal nature of these purchases, with consumers less willing to delegate decision-making.

Fig 12: Electronics and fashion show the highest readiness for AI-assisted shopping

Trust and comfort with AI vary by product category



Source: Retail Economics, Metapack, 2026

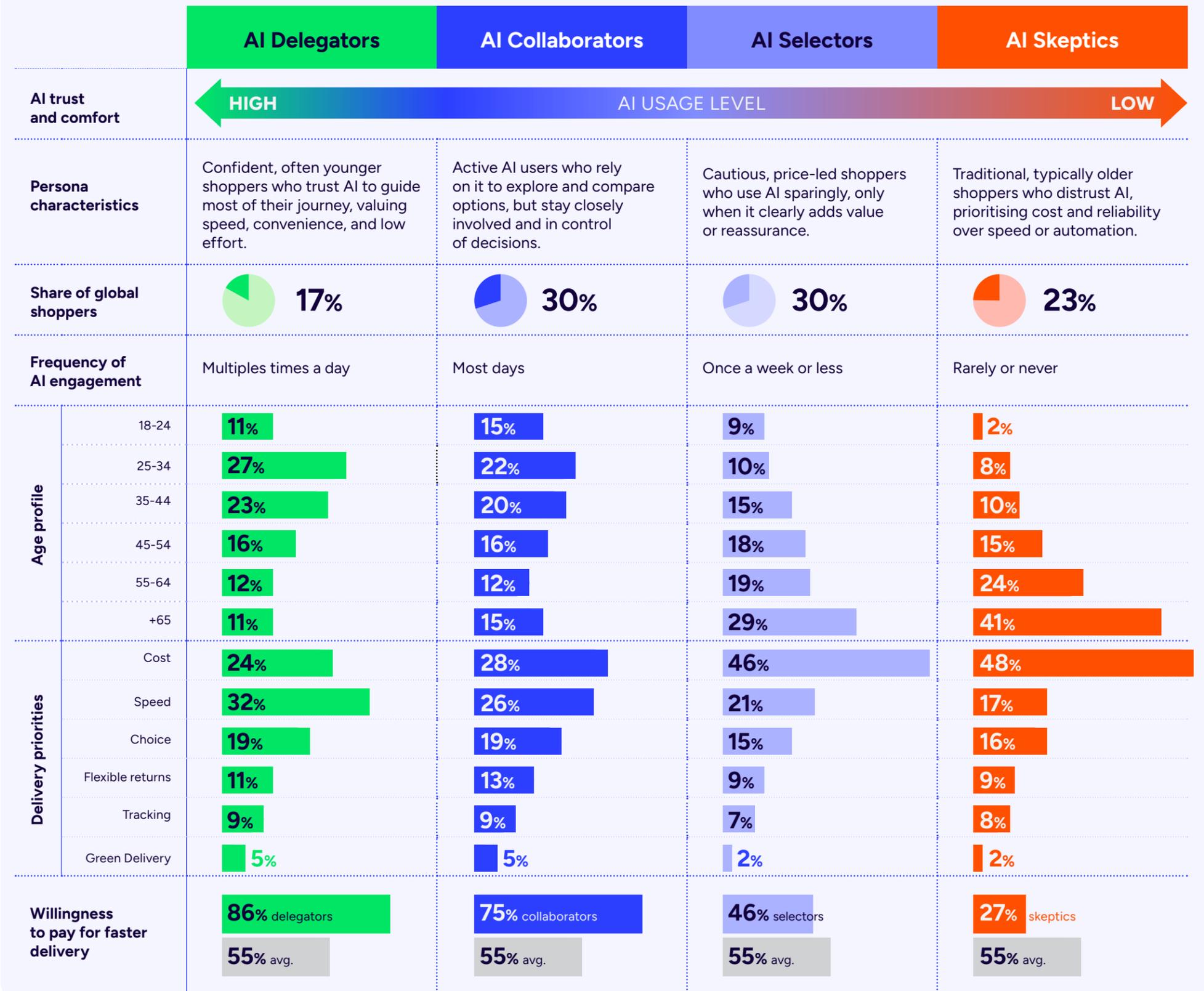
The four AI shopping mindsets

Our research identifies four distinct AI shopper personas based on characteristics of 8,000 international consumers. The personas reflect uneven AI engagement across the ecommerce journey, including frequency of use and willingness to involve AI in decisions at different stages (Fig 13).

The distribution highlights both momentum and restraint. **Around 17% of consumers globally fall into the AI Delegator segment**, rising to around one in four in the U.S., while the majority sit in the middle, using AI selectively to support discovery and evaluation rather than fully delegating decisions. **A meaningful minority (23%) remains cautious**, showing that adoption is progressing unevenly.

The commercial opportunity lies in recognising persona characteristics and responding accordingly, accelerating convenience for shoppers who value speed and simplicity, while building confidence and clarity for those who need more reassurance. Progress will come through selective use and earned trust.

Fig 13: The four AI shopper personas



Where delivery speed, price, and choice drive conversion

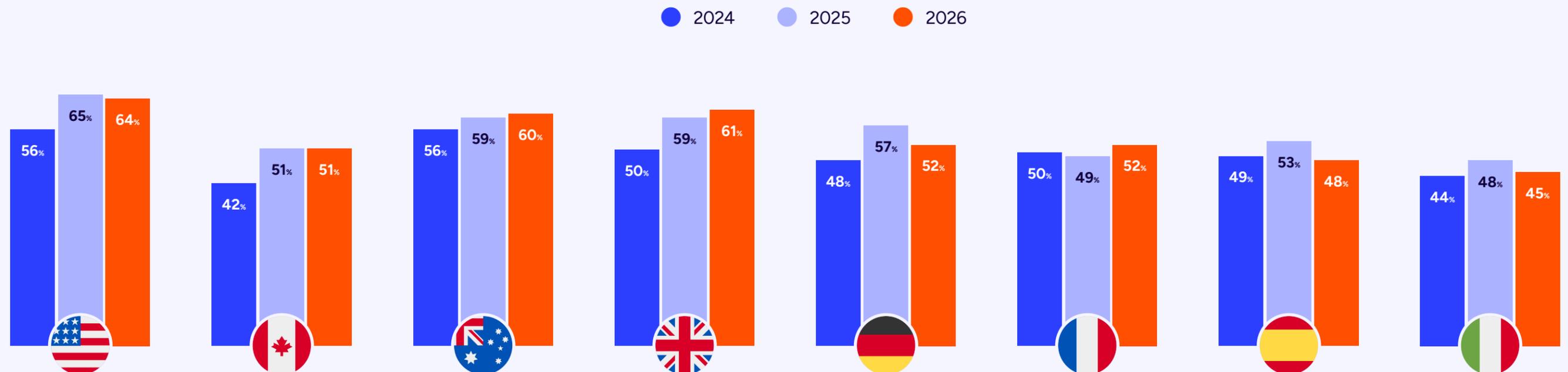
As AI increasingly shapes how consumers shop, delivery becomes a more visible and influential part of the ecommerce proposition. It is assessed alongside product, price, and availability, and plays a growing role in conversion, confidence, and loyalty. **In AI-mediated journeys, delivery is easier to compare, harder to justify when mispriced,**

and more powerful as a differentiator when done well.

Consumers are increasingly open to paying for faster or more convenient delivery, although their willingness to do so varies by market (Fig 14).

Fig 14: The U.S., U.K., and Australia lead on willingness to pay for premium delivery

Would you be willing to spend \$7-\$9 extra to have a typical \$40-\$60 online order delivered by a super-fast or chosen delivery method (e.g. same-day/next day delivery)? - Yes



Source: Retail Economics, Metapack, 2026

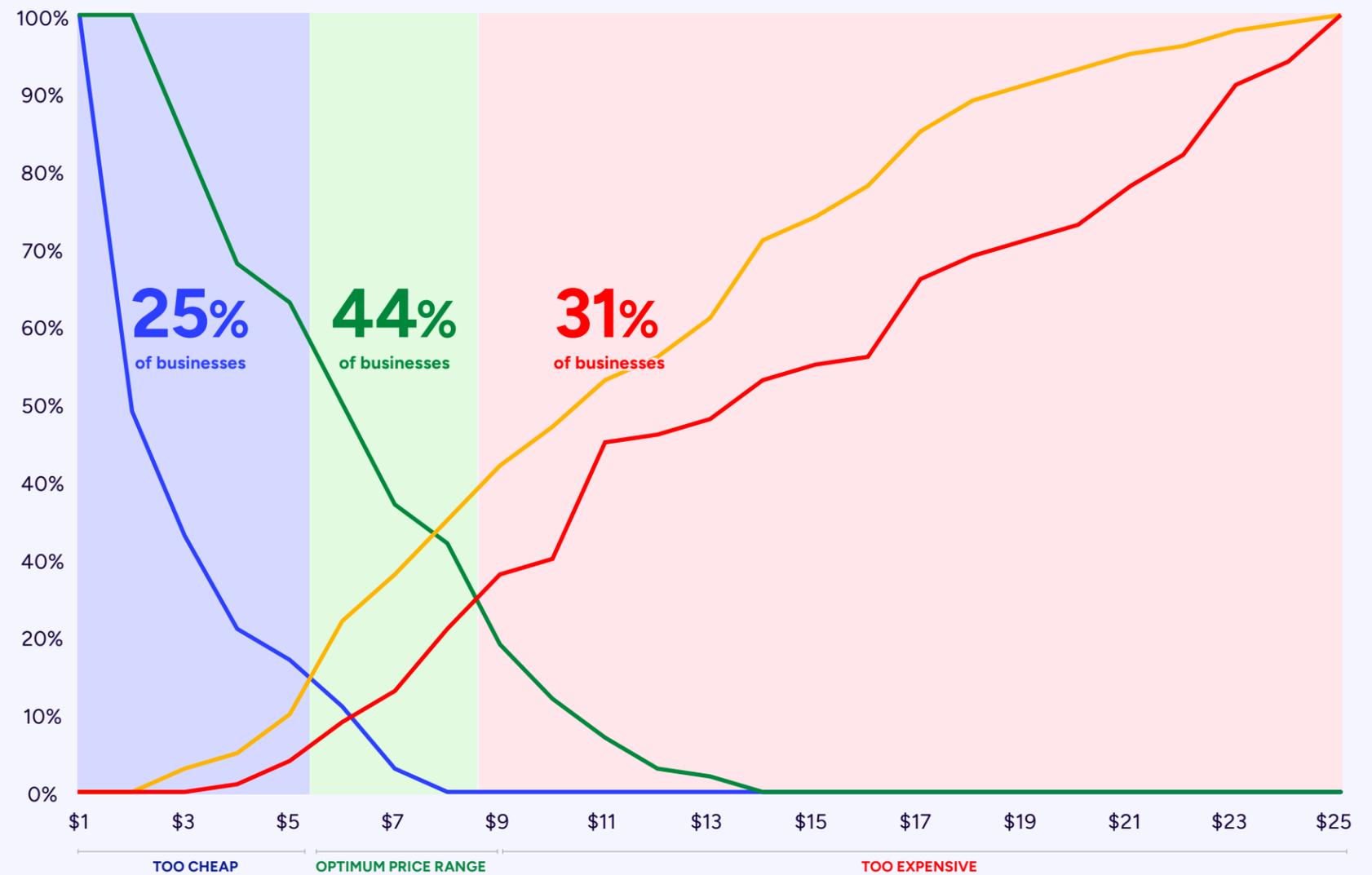
Free delivery still matters. However, it now sits alongside speed, flexibility, and certainty as part of a broader value equation for delivery. Younger shoppers and those with more time-sensitive needs tend to be more open to these trade-offs.

To understand where willingness-to-pay thresholds sit, we modelled shopper tolerance using price sensitivity analysis. This identifies the point at which a delivery upgrade shifts from being seen as good value to questionable, and ultimately unacceptable (Fig 15).

Fig 15: Optimum price range for premium delivery: \$5-\$9

For a typical online order (\$40-\$60), imagine a retailer offers free standard delivery within 5-7 days. At what point would the delivery fee for a faster or more convenient option be...

- **Too cheap:** You'd question the reliability of the delivery promise and quality of service
- **A bargain:** Great value for money
- **Getting expensive:** You'd consider paying this, but only in certain circumstances
- **Too expensive:** You'd never pay this much for delivery



Source: Retail Economics, Metapack, 2026. Note: Based on responses from 8,000 consumers across eight markets. Willingness-to-pay ranges shown in USD-equivalent terms for comparability.

Applied to premium delivery, the model identifies three clear behavioural thresholds:

<p>BELOW the optimal range (Too cheap) <\$5</p>	<p>Premium delivery fees of \$1-\$2 can undermine confidence, perceived as almost 'too good to be true', but also dilute the margin for brands.</p>
<p>OPTIMAL price range (Good value) \$5-\$9</p>	<p>This is the pricing 'sweet spot' where premium delivery feels proportionate to the benefit offered. Within this range, most shoppers are willing to pay without hesitation.</p>
<p>ABOVE the optimal range (Too expensive) \$10+</p>	<p>Resistance rises sharply. Shoppers actively reconsider or reject the option, thereby suppressing uptake and increasing the likelihood of drop-off.</p>

When these consumer expectations are compared with retailer pricing, a clear execution gap emerges (Fig 16). Across most markets, **fewer than half of retailers price premium delivery within the optimal range**, with many either charging too much and dampening conversion or pricing too low and forfeiting margin without increasing demand.

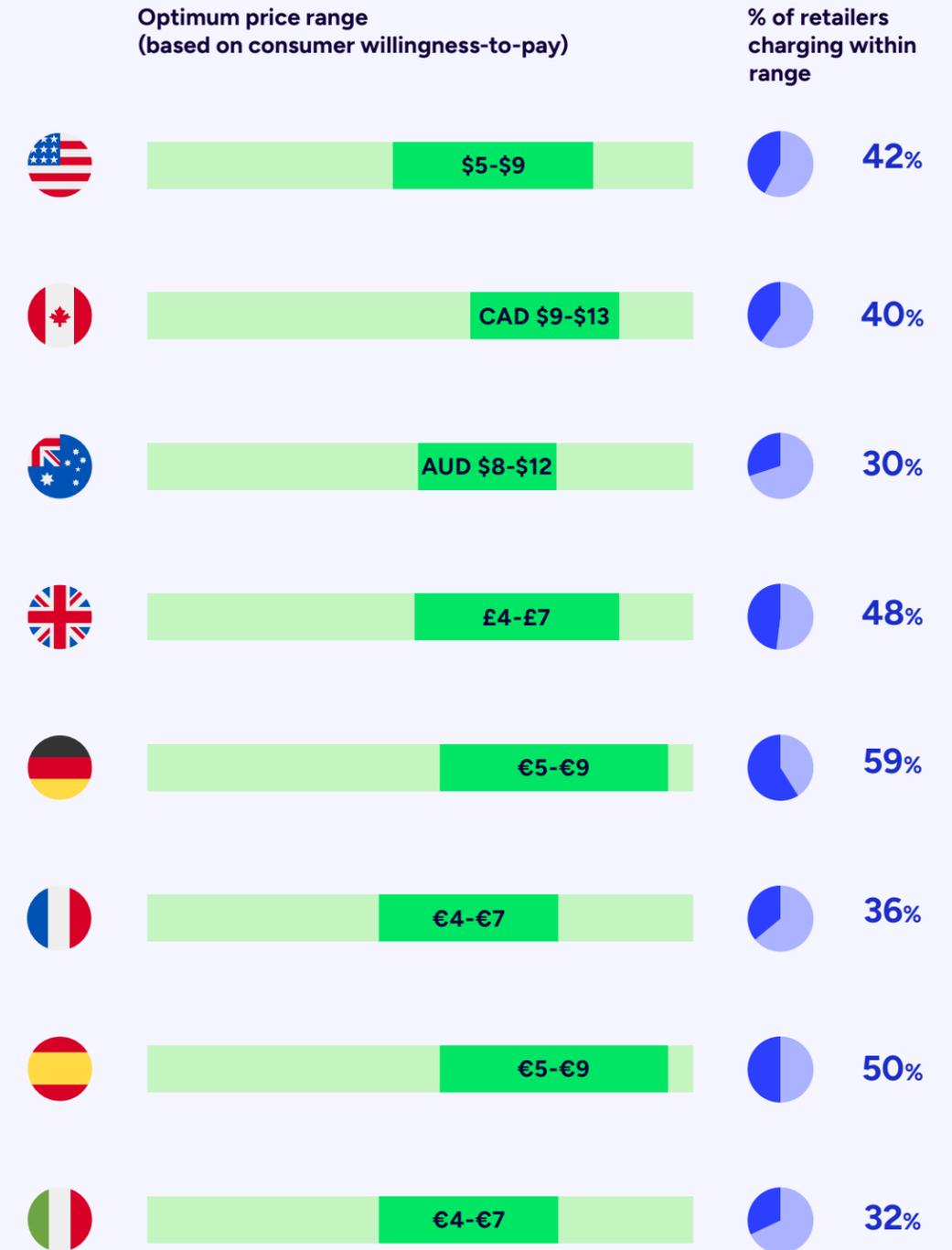
Willingness to pay for delivery is highly contextual. It varies by shopper, mission, and moment. A next-day upgrade may feel worthwhile for an urgent purchase or a high-value item, but excessive for routine orders. This is where AI enables genuinely

intelligent delivery by combining customer history, basket value, urgency signals, and location data.

In AI-assisted consumer journeys, decisions become visible earlier and judged more precisely. Here, **delivery shifts from a static fee at checkout to a personalised, machine-evaluated proposition that can either reinforce value or quietly remove a retailer from consideration altogether**. Retailers that utilise AI to align delivery speed, choice, and pricing with customer context can better convert while protecting margins.

Fig 16: Pricing sweet spots for premium delivery options

Based on retailer responses to the question: "How much do you charge for a faster or more premium delivery option?"



Source: Retail Economics, Metapack, 2026

How retailers are moving towards agentic retail

Over the next 12 to 24 months, online merchants will focus on embedding AI agents into core operating models and platforms, building foundations rather than pursuing full automation to enable more advanced use cases.

Larger retailers are more likely to develop agentic capabilities in-house, while smaller retailers are taking a partnership-led approach, relying on platforms, APIs, and technology providers (Fig 17). These are pragmatic responses to differing levels of resource, risk, and organisational complexity.

The key constraint is not ambition, but readiness, with business size playing a role:

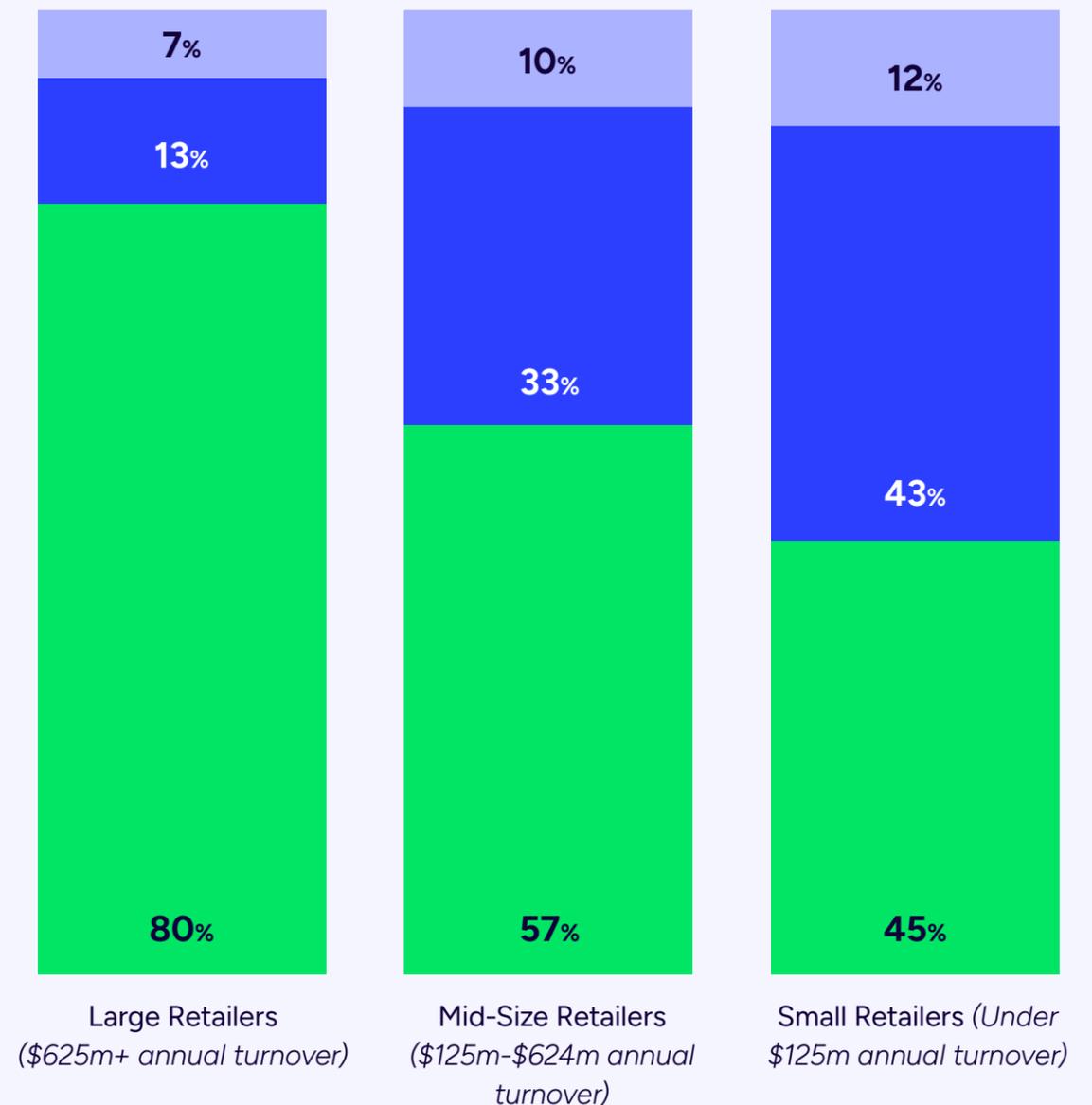
- **Larger retailers:** point to complexity integrating with legacy systems and governance as primary challenges.
- **Smaller retailers:** face skills gaps, data limitations, and cost pressures.

Deploying AI agents successfully is hugely reliant on data readiness, interoperable systems, and a technology stack capable of supporting real-time decision-making. Nevertheless, **90% of ecommerce businesses expect to invest more in AI agents and assistants over the next 12 to 24 months.**

Fig 17: Retailers are taking different paths to AI integration

Over the next 12 months, which best describes your plans for integrating with AI assistants (e.g., ChatGPT, Google Gemini)?

- Actively building or expanding integrations
- Exploring potential partnerships
- Monitoring developments but no current plans



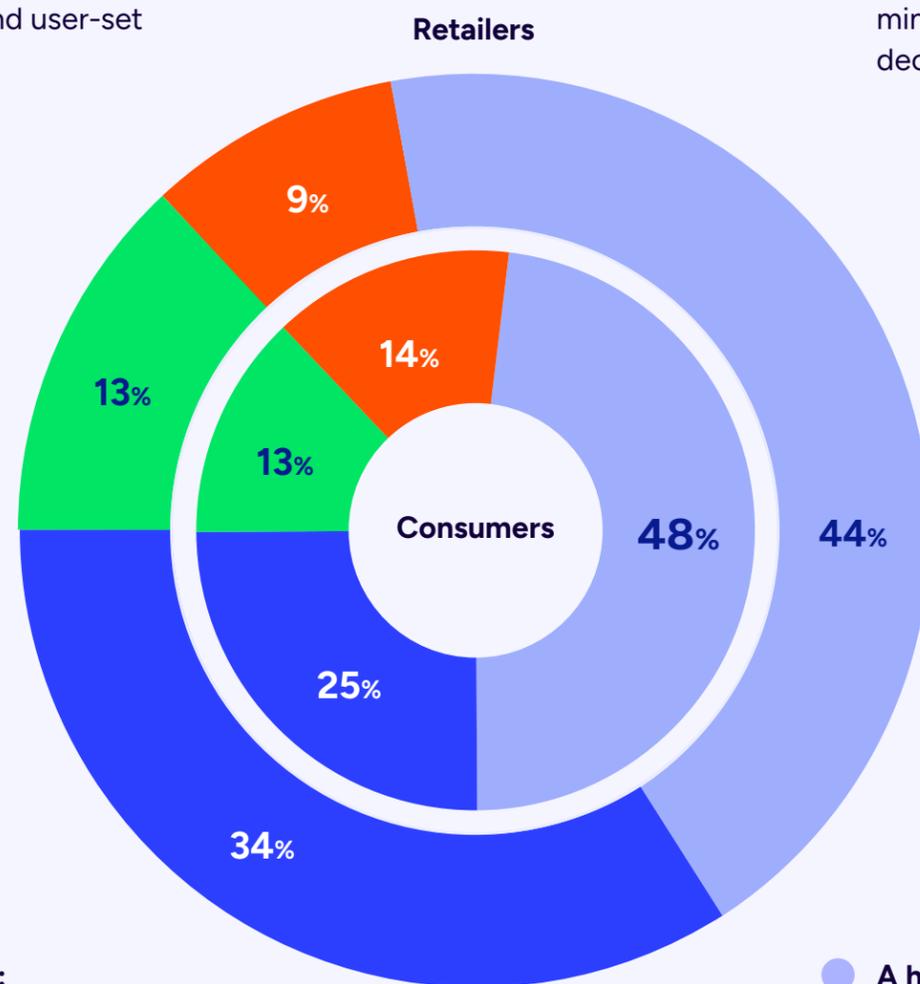
Source: Retail Economics, Metapack, 2026

Fig 18: Consumers and retailers are broadly aligned on AI impacts for shopping and delivery in the next five years

Over the next 12 months, with best describes your plans for integrating with AI assistants (e.g., ChatGPT, Google Gemini)?

● **A full-service agent:** AI manages most of the shopping journey, autonomously placing orders within defined rules and user-set parameters.

● **A passing trend:** AI remains a niche or short-lived experiment, with limited adoption and minimal impact on ecommerce decision-making.



● **A trusted co-shopper:** AI becomes a standard part of shopping, recommending products and managing baskets, with final approval retained by consumers.

● **A helpful assistant:** AI supports basic shopping tasks such as research and discovery, while purchase decisions remain firmly human-led.

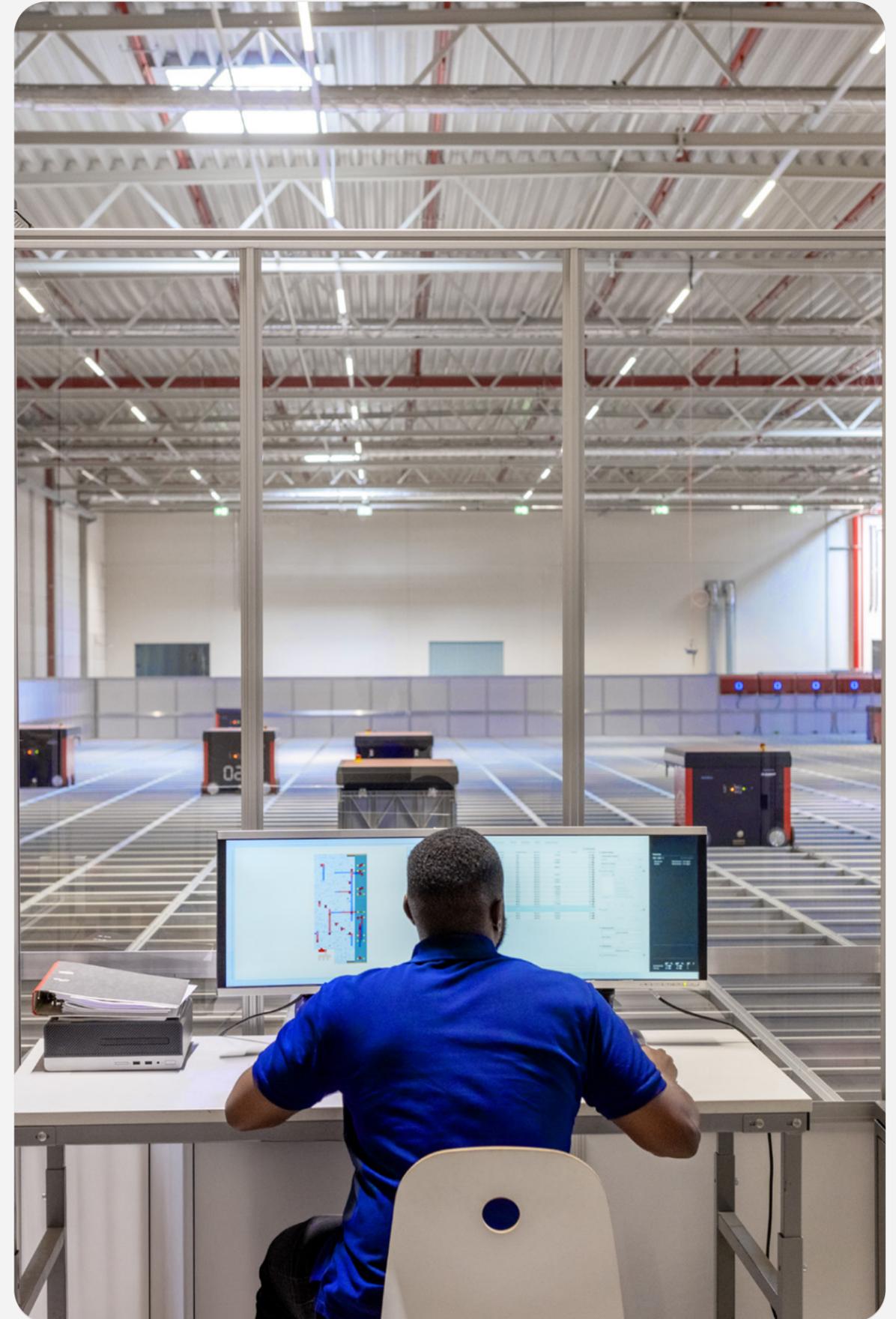
Source: Retail Economics, Metapack, 2026

Looking ahead, retailers and consumers largely agree on how they expect AI to impact shopping in the future. They see it as a helpful assistant or trusted co-shopper, rather than a fully autonomous agent (Fig 18). While retailers have higher expectations that AI will take on more control over time, full delegation remains a minority view. For now, **the next phase of agentic retail is more about earning trust.**

SECTION III

Building AI Readiness: Actionable Steps for Retailers

As ecommerce evolves, success in agentic retail will depend on how well retailers prepare their organisations, systems and customers for deeper AI involvement—building strong foundations, clear guardrails and deploying AI where it delivers measurable value.



1

Get the fundamentals right before scaling AI

Agentic retail depends on accurate, consistent, and timely data across products, pricing, inventory, and delivery. Brands should prioritise resolving fragmentation across systems and improving data quality before pursuing more advanced AI use cases. In 2026, the ability to support AI-driven recommendations or execution will be constrained by foundational readiness, making data discipline a competitive differentiator rather than a technical hygiene factor.

2

Treat fulfilment and delivery as decision engines

As AI increasingly influences shopping journeys, fulfilment and delivery choices shape what customers see, select, and buy. Retailers must ensure delivery options, availability, and cost are integrated into decision-making earlier in the journey, rather than treated as a final checkout consideration. Elevating logistics from execution to a decision engine will be crucial in supporting smarter recommendations, more reliable commitments, and enhanced conversion.

3

Design for human control alongside increasing automation

Despite growing interest in AI, trust levels vary, with consumers cautious about giving up decision-making control. Successful strategies will embed clear approval points, escalation paths, and override mechanisms into AI-supported journeys. Designing for human control allows retailers to scale automation responsibly, build trust, and adapt as comfort with delegation evolves.



4

Focus AI investment where impact is measurable

In the near term, AI will deliver the greatest value in areas where outcomes can be clearly tracked and optimised. Retailers should prioritise use cases that improve operational efficiency, reduce cost-to-serve, or enhance delivery performance, rather than investing in front-end experiences with limited impact. Clear KPIs will be essential in guiding investment decisions and maintaining momentum.

5

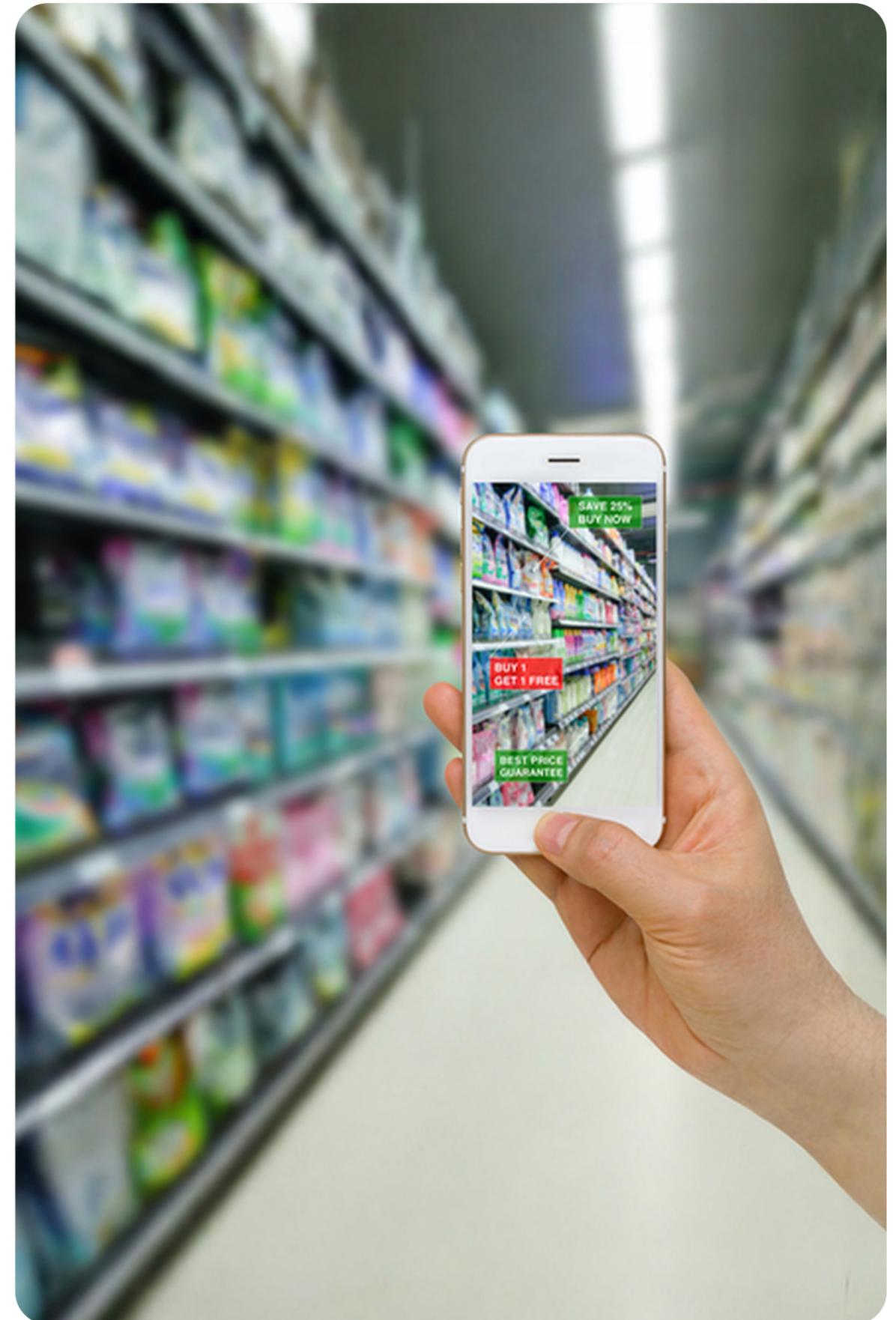
Use partnerships to extend capability without overreach

Few retailers will build advanced AI capabilities end-to-end on their own. Strategic partnerships across technology, logistics, and payments can accelerate progress while enabling retailers to maintain their focus on core strengths. A modular, partner-led approach reduces complexity, limits risk, and preserves flexibility as AI capabilities and standards evolve.

6

Bring customers with you

Consumer expectations remain anchored in assisted shopping, rather than full automation. Retailers must clearly communicate how AI is used, where control sits, and what value customers receive in return. Lastly, education, transparency, and consistent experiences will be essential for building confidence and supporting a gradual shift towards greater delegation over time.



Conclusion

Ecommerce is evolving rapidly. AI is becoming a practical enabler across the customer journey, supporting smarter decision-making, more relevant experiences, and greater operational efficiency. At the same time, shifting discovery behaviours and heightened expectations are prompting retailers to rethink how shopping, fulfilment, and post-purchase experiences connect.

Intelligent delivery is emerging as a critical capability, with smarter promise-setting, improved reliability, and lower cost-to-serve playing a growing role in customer satisfaction and loyalty.

Applying AI in ways that improve execution (rather than simply adding new features) allows brands to reduce friction, respond more dynamically to demand, and build more resilient operations. These investments also lay the groundwork for more advanced forms of automation and delegation over time, creating opportunities to gain a competitive advantage.

Brands that combine responsible use of AI with intelligent delivery strategies, while remaining anchored in customer trust, will be best placed to compete and grow in the AI era.



About Metapack

Metapack helps ecommerce and delivery professionals meet consumers' growing expectations of delivery while maintaining and optimising operational efficiency. Metapack's solution offers a wide range of personalised services, from delivery options to tracking and returns, through a catalogue of 350+ carriers and 4,000+ services available that span every country in the world.

Thanks to Metapack, more than a billion packages are sent annually by many of the world's leading ecommerce retailers. Metapack is headquartered in London.

Find out more at www.metapack.com



About Retail Economics

Retail Economics is an independent economics research consultancy focused on the consumer, retail and leisure industries. We analyse the complex retail economic landscape and draw out actionable insight for our clients. Leveraging our own proprietary retail data and applying rigorous economic analysis, we transform information into points of action.

Report Authors:

Richard Lim, CEO

richard.lim@retaileconomics.co.uk



Josh Holmes, Head of Research

josh.holmes@retaileconomics.co.uk





The intelligent delivery experience platform, built for what's next

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