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Similarweb's 3rd Annual Global Ecommerce Report: Growth Shifts to Apps and AI

Ecommerce traffic is consolidating in marketplaces and a few strong verticals, while apps and AI emerge as the fastest-growing channels.

TEL AVIV, Israel--(BUSINESS WIRE)--

While ecommerce websites are fighting for every increment of traffic, app-based ecommerce is experiencing strong growth, according to The Global State of Ecommerce 2025 report published today by Similarweb (NYSE: SMWB). The report also finds web marketplaces such as Amazon and Temu growing faster than specialized stores. Meanwhile, the trickle of traffic from AI chatbots is proving important because those visitors are primed to buy.

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The report compares estimated online activity for the period July 2024 to June 2025 with the previous year, July 2023 to June 2024, revealing which marketplaces, merchants, websites, apps, categories, and countries are seeing the greatest growth.

Key findings:

- **Web versus apps:** Overall visits to ecommerce and shopping websites dropped 1% over the past year, but ecommerce app sessions were up 13%.
- **AI refers high-intent buyers:** Ecommerce websites are attracting a small but fast growing and important share of traffic from AI chatbots like ChatGPT. Similarweb estimates the conversion rate for visits referred by ChatGPT is 11.4%, compared with 5.3% for organic search.
- **Marketplaces versus stores:** On the web, ecommerce activity is increasingly concentrated in marketplaces like Amazon and Temu, as opposed to stand-alone stores. But even in aggregate, the marketplaces only grew traffic 1%.
- **Beauty and luxury stores outperform:** Stores focused on beauty and luxury goods are seeing modest growth, while home and garden, fashion and apparel, and consumer electronics are weathering a downturn in web traffic.

"There's a lot of panic in the market over AI-driven changes in search, but that should not obscure the upside," said Laurie Naspe, Director of Market Insights at Similarweb. "We believe brands and sellers who successfully optimize for AI visibility are likely to capture a new traffic channel that delivers high-intent visitors – people who are primed to buy because they've already done their research in ChatGPT or Gemini. Meanwhile, getting consumers to download your app and making the app a truly engaging experience is a powerful way to make shopping your store a habit.

"In other words, whatever is happening in the broader market, there are always businesses who outperform by getting ahead of the trends – you just need to make sure you're one of them," Naspe said. "A good example is beauty brand Il Makiage, which according to Similarweb estimates has seen global visits more than double in the past year thanks largely to effective social media marketing, which is particularly important in their niche."

The report recommends sellers should sharpen marketplace strategies and rethink how to stand out to keep customers in slower or shrinking verticals.

According to Similarweb insights, Amazon remains by far the largest ecommerce site on the web (nearly 1.3 million monthly unique visitors, compared with 314.9 million for #2 Temu) and also leads in monthly active users (MAUs) of its apps, 651.7 million. In second place for app usage is Shopee, from Southeast Asia, at 392.8 million MAUs, followed by Temu at 246.4 million. Despite its tariff challenges in the US, Temu grew its traffic 56.9% over the past year. The fastest growing digital properties tend to be more specialized online stores like apparel merchant Quince, with its web visitors up 130.9%, and women's clothing store Farm Rio, with app MAUs up 311.8%.

For much more detail, download the full Global State of Ecommerce 2025 report. The report addresses macro trends like the increased importance of brand visibility in the answers delivered by ChatGPT and similar platforms and strategies for success like social media engagement for beauty brands. In addition, it provides chapters focused on marketplaces like Amazon and online store categories including beauty, fashion, consumer electronics, and home and garden.

About Similarweb

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