How Apple's new AI model could fuel mcommerce growth

Article

Earlier this month, Apple unveiled a new AI model, called the ReaLM system, which can recognize and pull out phone numbers or recipes from on-page images, or respond to a request to call "the bottom one" when users are presented with a list of local pharmacies.

While Apple has not confirmed whether ReaLM will be integrated into Siri or other Apple products, the commerce implications are clear, particularly for mobile users.

Hold the phone: AI models like RealLM will make it that much easier to browse and buy things on phones.

- "You can very seamlessly, especially on your phone, ask about a particular product and get answers rather than having to type in stuff," our analyst Yory Wurmser said on a recent "[Behind the Numbers: Reimagining Retail](#)" episode.

- For Apple users, ReaLM may enable them to search outfits based on an image they see or create a shopping list based on a photo of a recipe.

  With ReaLM, Apple could buoy adoption of its smartphone assistant Siri and enable more consumers to shop via mobile.

- Nearly a quarter (24.6%) of the US population will use Siri this year, per our forecast. However, the growth in users is slowing, going from 6.4% in 2021 to just 2.8% in 2025.

- US [mcommerce](#) sales growth is speeding up, increasing from 11.7% in 2024 to 13.4% in 2028. US mcommerce sales will reach $542.66 billion this year, per our forecast.

  Beyond mobile: AI could also improve shopability for smart glasses, said Wurmser.

- "As these become more developed, as you start getting options on screens, as the cameras let you identify objects in the real world, it becomes a much more intuitive way for things like visual search and then buying straight from it," he said. "There's some technological leaps that still need to happen for that to take place, but I think they're coming."

- Affordability plays a role, considering the initial price for Apple's Vision Pro is $3,499. But on the bright side: "If you can afford a Vision Pro, you can afford other stuff," said Wurmser.

  Speak(er) now: But Apple isn't the only one experimenting with AI in smart devices. Amazon is integrating a new large language model into Alexa, which could boost commerce via smart speakers, as 75.5 million consumers will use Amazon Alexa in the US this year, per our forecast.

- The number of smart speaker shoppers (individuals who use a smart speaker to research products or add products to a shopping cart via voice command) is growing slowly but steadily (between 3.4% and 3.6% from 2023 to 2027), reaching 38.6 million US consumers this year, per our forecast.

- Of those, nearly three quarters (74.9%) will make a purchase via smart speaker this year, 4.3% increase YoY.

The bottom line: While mcommerce stands to benefit the most from Apple integrating ReaLM into its product ecosystem, it could also spark commerce via other smart devices like glasses or speakers. However, it could take some time for AI to mature enough to be useful across other smart devices, and even longer to gain traction among consumers.

This was originally featured in the Retail Daily newsletter. For more retail insights, statistics, and trends, subscribe here.