AI in Retail Global Report

Advancing in the Engagement Era

In collaboration with ecommerce Italia by Casaleggio Associati

SAP Emarsys

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Foreword by Davide Casaleggio

Davide Casaleggio,
CEO Casaleggio Associati

CASALEGGIO ASSOCIATI
Pensare Digitale

“83%
of merchants in Italy see a significant impact of AI by the end of 2025”

Italian Ecommerce turnover will exceed **£90 billion by the end of 2025** consolidating its position as a structural component of the Italian economy. At the same time, the sector is undergoing a profound transformation, driven by the introduction and spread of artificial intelligence.

AI-commerce is already a reality in Italy: at the beginning of 2025, 35% of Italian merchants believed that AI had already had a significant impact on their business model, with a further 48% assuming that this will happen by the end of the year, reaching 83% of companies.

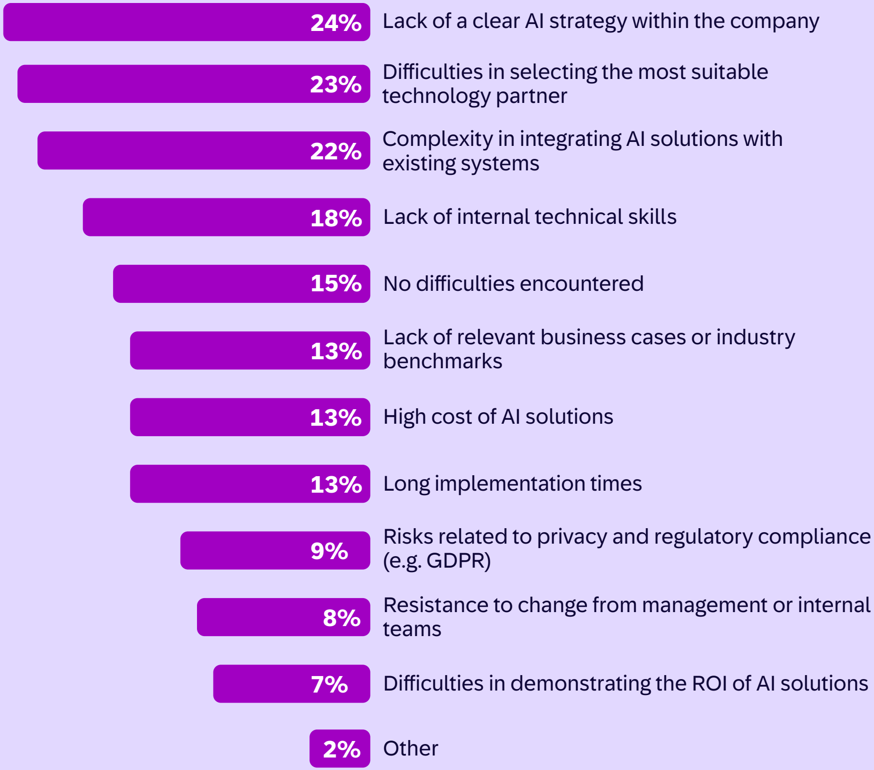
The main uses of AI for Ecommerce

Graph source: "*Ecommerce in Italy 2025*" Report, Casaleggio Associati

The uses of AI are mainly linked today to the efficiency of business processes in terms of content management, translation, automated data analysis and improved customer service.

During 2026, with the emergence of solutions based on AI agents, these cases will expand significantly, paving the way for new scenarios.

Difficulties in using AI



Graph source: "*Ecommerce in Italy 2025*" Report, Casaleggio Associati

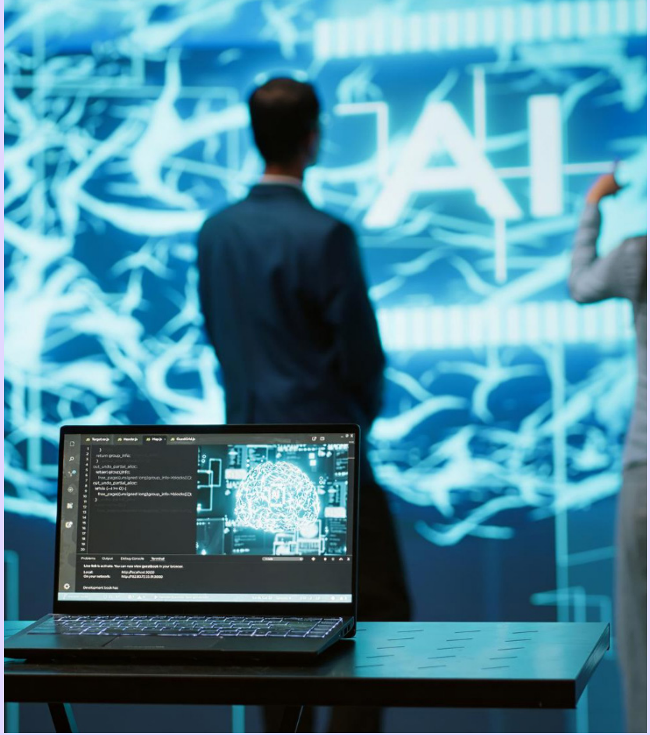
While the opportunities offered by AI are clear, not all companies are able to seize them immediately.

The main difficulties are internal and relate to the lack of clear corporate strategy on AI, which today represents a significant obstacle to its full adoption.

However, artificial intelligence is not just synonymous with efficiency: it represents a **real paradigm shift**.

One of the most relevant questions concerns the future of digital behavior: what will happen if people prefer to interact with chatbots or 'digital butlers' instead of search engines?
In this scenario, the channels that are fundamental today – **SEM (30% of the marketing budget)** and **SEO (16%)** – could suffer a drastic decline.

But the transformation will not be limited to the search for new sources of traffic: with the emergence of digital agents, merchants will have to face a new sales model, **B2A (Business to Agent)**.



At the same time, the **customer experience** will evolve towards a 'zero click' paradigm, in which the Merchant's website will no longer be the main point of differentiation.

Introduction

“**AI marketing is now fully in motion:** it has transitioned from the theoretical to the practical as marketers welcome AI into their strategies and test possibilities.

With unrelenting waves of socioeconomic uncertainty, engagement strategies must change, not just from month to month but even week to week. To create AI-driven personalized customer experiences at scale, retailers need a foundation that unifies customer data across loyalty, in-store, e-commerce, mobile, and more. **This is why more than 80% of retailers worldwide are using or transitioning to SAP (source: SAP).**

We're committed to delivering new AI solutions so marketers can create experiences that turn consumers into loyal, lifelong customers.”

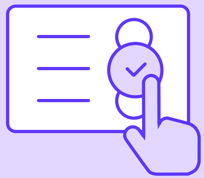
Sara Richter,
CMO, SAP Emarsys

Methodology

This research was conducted by Opinium, who surveyed 10,000 general respondents and 1,250 marketers in the United Kingdom (UK), United States (US), Germany, Taiwan, and United Arab Emirates (UAE). The data was collected between 11–18 March 2025.

Opinium abides by and employs members of the Market Research Society and follows the MRS code of conduct which is based on the ESOMAR principles. Opinium is also a member of the British Polling Council.

The data in the report predominantly comes from the global sample overall. In the 2025 research the markets surveyed were UK, US, Germany, Taiwan, and UAE to form the global data. Whereas in the 2024 data the markets surveyed were UK, US, Germany, and Australia, which formed the 2024 global insight.



10,000

general respondents were surveyed.

AI in the Engagement Era

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Consumers are savvier than ever, using AI to help them find products and deals, often unaware that AI is powering these experiences. Marketing teams are tasked with becoming the change agent to lead retail organizations into this Engagement Era in which we find ourselves, where consumers expect and even demand highly personalized experiences. To meet those expectations, marketers must create deep ERP integrations to connect operational data with customer experiences.

As today's marketplace is filled with uncertainty, marketers will need to team up with IT, sales, service, and other partners across the business to differentiate their brand through highly personalized customer engagement.

Marketers who are seeking to secure a sustainable path to success — those who want to increase efficiency and create exceptional customer experiences — are turning to AI.

5 key takeaways: Is your brand prepared for the shifting status quo?

1. Online and offline are converging more than ever.

55% of retail purchases have been made in a physical store.

54% have been made through an online marketplace.

2. AI is working.

71% of marketers agree that AI allows their team to build and launch new marketing campaigns more quickly, saving on average **2.3 hours** per campaign.

3. Personalization is king, but there's still a gap for marketers.

69% of consumers are satisfied with the personal product recommendations they received.

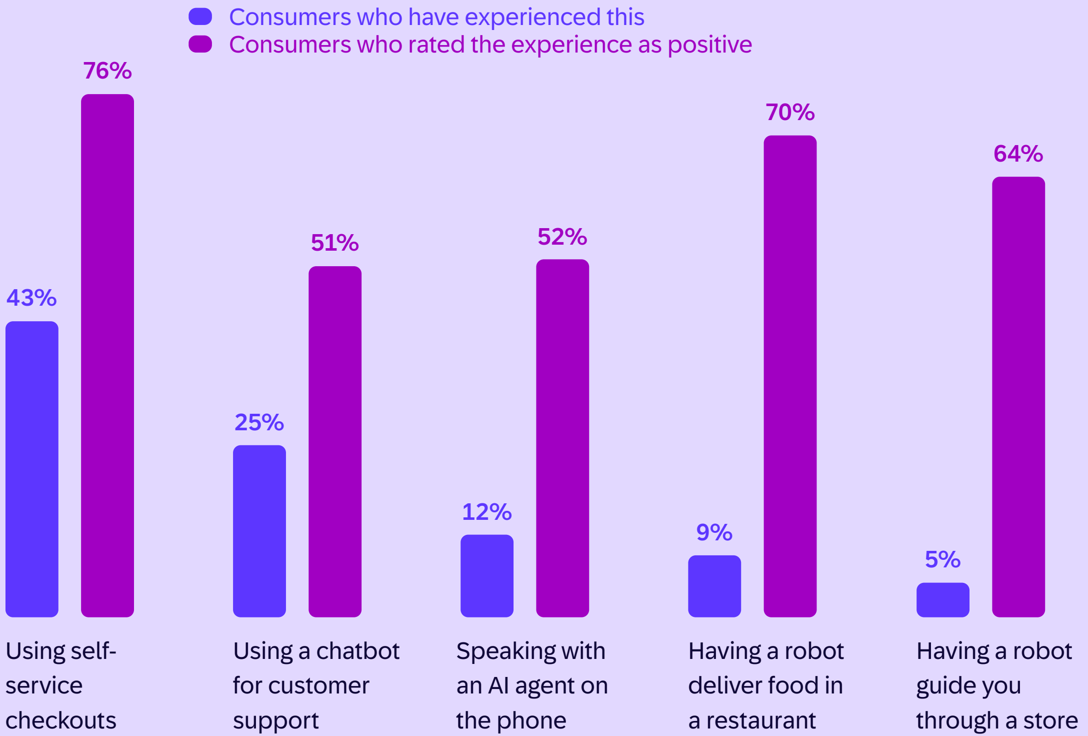
4. Marketing investment in AI is growing.

64% of marketers plan to invest more in AI in 2025 to boost customer engagement.

5. Consumer trust is still falling short.

63% of consumers are not confident in the data privacy of AI (44% in 2024).

What experiences are consumers having with AI in retail?



Test, learn, grow

AI-driven marketing is still in its early stages — and that means opportunity. Although consumers have had relatively little exposure to the experiences listed here (all less than 50%), their overall feedback has been largely positive (all above 50%). This can serve as inspiration for marketers to begin implementing small-scale AI projects with the intention to learn, optimize, and expand, all while offering new and delightful brand experiences.

Embracing AI: Gibson

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"I can't let my mind just jump straight to 'more head count or budget' to solve complex resource equations. **If I can find a utility [AI] that can help my staff think more strategically and creatively, that's needed because we're a very creative business at the core**. This of course creates a new set of leadership challenges on its face. But that is the reality of where technology and culture collide, and we as leaders have to open the aperture of possibilities."

46%

of revenue driven by campaign automation.

Sterling Doak,
Head of Marketing,
Gibson Inc.

Gibson

Discover how Gibson creates omnichannel customer journeys.

Watch the Demo

What are retailers getting wrong?

63% (2025)

44% (2024)

of consumers are not confident in the data privacy of AI.

60% (2025)

44% (2024)

of consumers believe the majority of marketing emails they receive aren't relevant.

40% (2025)

25% (2024)

of consumers say brands don't understand them as a person.

33% (2025)

23% (2024)

of consumers think brands don't personalize content to meet their needs.

The personalization gap

Are you ready to embrace the Engagement Era? Many marketers struggle to excel in this new engagement-driven landscape and fall into what we've identified as "the personalization gap."

The primary cause of this gap is almost always disconnected data, resulting in silos not just between marketing channels, but also between marketing, supply chain, finance, and other areas of the business. Only by creating a unified foundation for data, in which all aspects of the business are visible, can marketers bridge the gap.

When consumers share data with brands, brands need to A) follow through and use that data to the consumer's benefit, and B) ensure that data is used securely and strictly in accordance with their consent. For marketers to do that, connected data is essential and will super-charge their AI strategy.

How are shoppers using AI in their shopping experiences?

Make buying easier

Flooded with noise, shoppers are seeking ways to make their buying decisions faster. Marketers need to connect interactions across touchpoints to help them at every stage of the journey.

Start with understanding the customer lifecycle. AI-powered segmentation and product recommendations can help deliver the right message at the right time and accelerate purchase decisions from "maybe …" to "of course!"

Marketers must connect online and offline, following up post-purchase to ensure consumers' needs were met and encourage them to refer a friend. The shopping experience doesn't end at purchase — AI can help!

Attitudes toward AI in Retail

Advocates vs. Skeptics — Marketers

Regional differences in opinions around AI

	Taiwan	UAE	Germany	UK	US
Marketers who agree AI is essential to their customer retention strategy in 2025	77%	75%	63%	59%	54%
Marketers who use AI in decisions about sustainability	65%	73%	56%	50%	41%
Marketers who believe AI is essential for fully leveraging their customer data to achieve their business goals	79%	78%	66%	60%	53%

Advocates vs. Skeptics — Consumers

Regional differences in opinions around AI

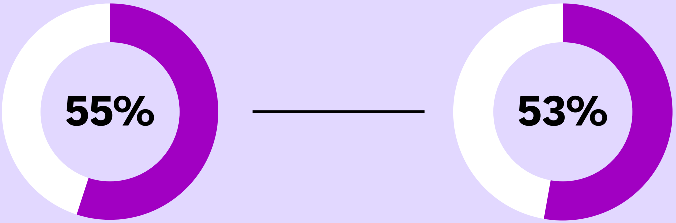
	Taiwan	UAE	Germany	UK	US
Consumers who report a positive impact of AI on their retail experience	60%	**68%**	41%	23%	33%
Consumers who report a positive impact of AI on their buying decisions	50%	**61%**	29%	16%	26%
Consumers who believe brands should use AI to make their shopping experience more personal	**48%**	38%	20%	17%	22%
Consumers who would support brands bringing more AI into the buying experience	**73%**	72%	47%	34%	42%

Retail experience *is the overall interaction a customer has with a brand or store, both online and offline, including the entire end-to-end journey (awareness, comparison, purchase, feedback, etc.).*

What is the consumer demand for AI adoption?

Ease, speed, and immediacy outweigh cheaper product offerings.

How consumers benefit from AI:



of consumers say AI makes shopping **easier**

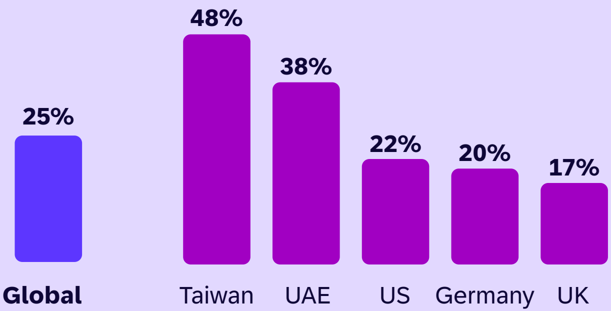
of consumers say AI makes shopping **faster**

Consumers want brands to use AI across the entire shopping journey to:

- **37%** Provide quicker customer service
- **32%** Increase delivery speeds
- **32%** Ensure products are always in stock

Personalization continues to rise, with consumers also wanting brands to use AI to:

Make the shopping experience more personal

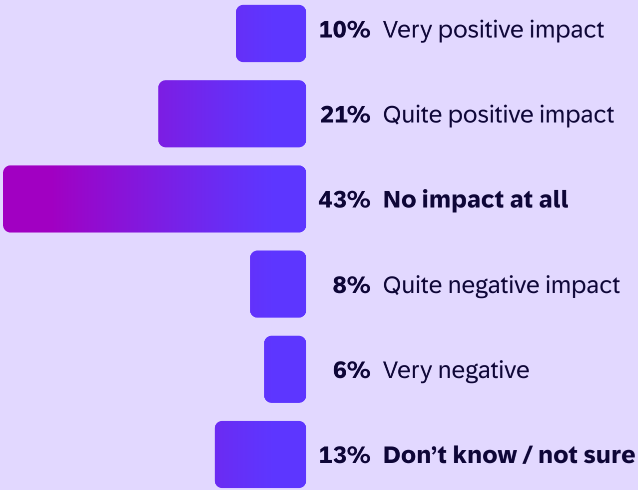


Make recommendations more personal **25%**

Make marketing more relevant to me **24%**

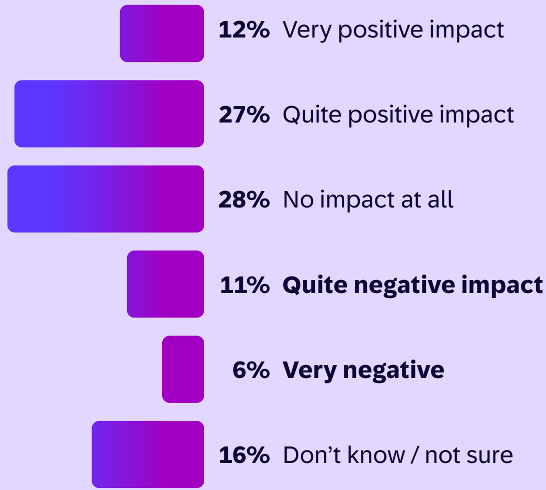
How do consumers feel about the impact of AI?

How consumers feel about the impact they believe AI is having on their buying decisions:

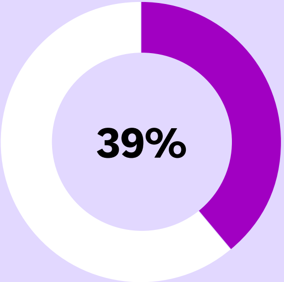


More than half (56%) of consumers can't identify AI's impact on their buying decisions.

How consumers feel about the impact they believe AI is having on their retail experience:

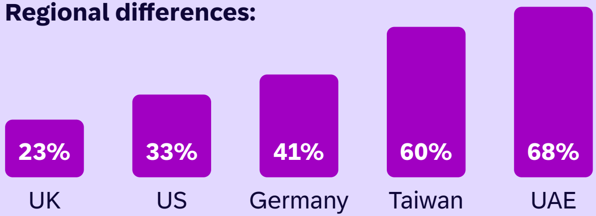


Only 17% of consumers think AI is having a negative impact on their retail experiences.

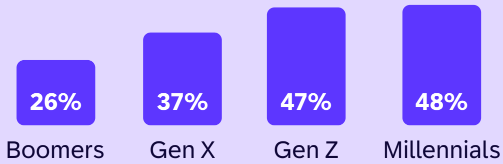


of global consumers believe AI is having a positive impact on their retail experience.

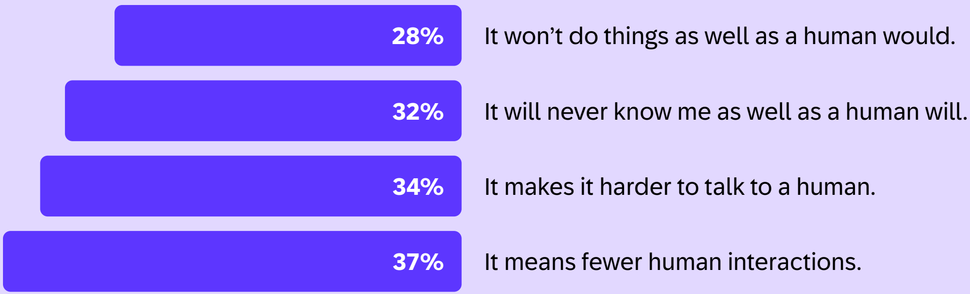
Regional differences:



Generational differences:



Consumers’ top concerns around AI and its impact on their buying decisions:



Low impact on consumers … is that good or bad?!

The lack of perceived impact by the consumer can be seen as a sign that AI is being seamlessly introduced into customer engagement, so that it isn’t causing disruption. In most cases, AI isn’t drastically changing the buying experience but rather *how* the experience is executed (by both consumers and marketers). At the same time, it's having a positive impact on efficiency for marketing teams.

Consumers don’t need to care about a marketer’s AI usage any more than they need to care about segmentation reports. They have better things to do … like using the new product they love.

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Gaps between consumers and marketers

Our research uncovered areas where consumers and marketers have differing opinions on the retail experiences being offered, creating the personalization gap. Here's what we found, as well as suggestions for how marketers can take action to better align with consumer expectations.

Consumers	Marketers	Closing the Gap
Only **29%** of consumers believe that brands offer enough value in exchange for their data.	**64%** of marketers agree that their organization offers customers enough value in exchange for their data.	Ensure that your organization has a foundation for connected data, linking all areas of the business. Then create a detailed data plan that maps the data collected to the value delivered. Avoid collecting data that will go unused.
25% of consumers think brands should use AI to make the shopping experience more personal.	**79%** of marketers use AI to personalize content and campaigns.	Only **39%** of marketers are using AI to create new experiences for customers. Marketers need to go beyond the basics of personalization and explore more innovative experiences.
51% of consumers have had a positive experience using a chatbot for customer support.	**32%** of marketers use AI for chatbots.	Give the people what they want: where customers are having positive experiences, enhance and expand your offering with AI-assisted functionality to help you scale.

AI in Action: City Beach

“We wanted a single marketing solution that could scale up with our business. SAP Emarsys helped us join the dots across an increasingly complex customer journey with touchpoints from stores to website to customer service interactions. Implementing AI was a perfect fit for our retention and reactivation activities. **AI was able to predict where people were churning or defecting at a 1:1 level, and this allowed us to send campaigns based on customers’ individual lifecycle.**”

48% win back from defecting customers within 90 days with SAP Emarsys AI.

Mike Cheng, Head of Digital, City Beach

Learn more about the City Beach success story.

Read Now

Benefits of AI

How is AI empowering marketers?

92%
of marketers are using AI in 2025.

70%
of marketers are using AI to optimize campaign performance in real time.

66%
of marketers are using AI to predict future consumer behaviors.

AI is also used by marketing departments for:

- **35%** Copywriting for marketing materials
- **35%** Improving customer targeting
- **34%** Optimizing marketing materials
- **32%** Automation of menial tasks
- **32%** Introducing chatbots and customer service

The AI curve

The overwhelming majority (92%) of marketers are already using AI. Those who are using it are reaping more benefits faster, both as they increase their KPIs and as they gain experience, establishing best practices.

Most likely you're using AI already in your day-to-day tasks. The real question is, are you missing out on areas where AI could be applied?

Never stop pushing the curve! (And we won't stop pushing forward, either.)

What impact are marketers seeing with AI?

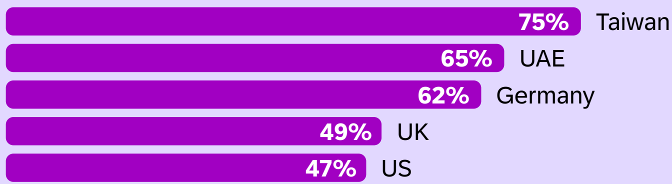
72% of marketers say AI frees their team to focus on more creative aspects of their role by reducing repetitive/time-consuming tasks.

71% of marketers agree that AI allows their team to build and launch new marketing campaigns more quickly, saving on average **2.3 hours** per campaign.

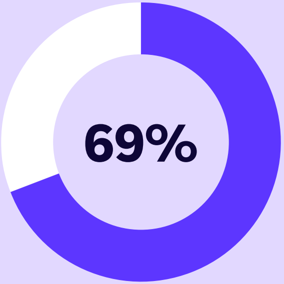
60% of marketers have reported an increase in customer engagement since the adoption of AI.

58% of global marketers have seen an increase in customer loyalty since the adoption of AI into their campaigns.

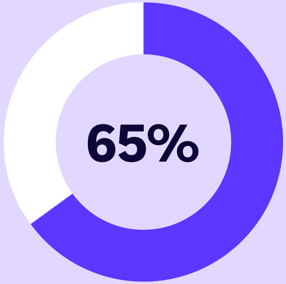
Regional differences:



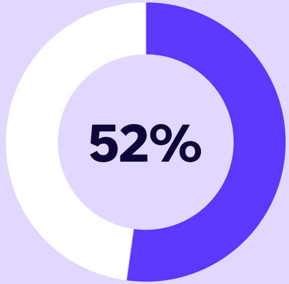
How is AI improving customer engagement?



of consumers are satisfied with the personal product recommendations they received.



of consumers are satisfied with the personalized offers and marketing materials they received.



of consumers who spoke with an AI agent on the phone reported a positive experience.

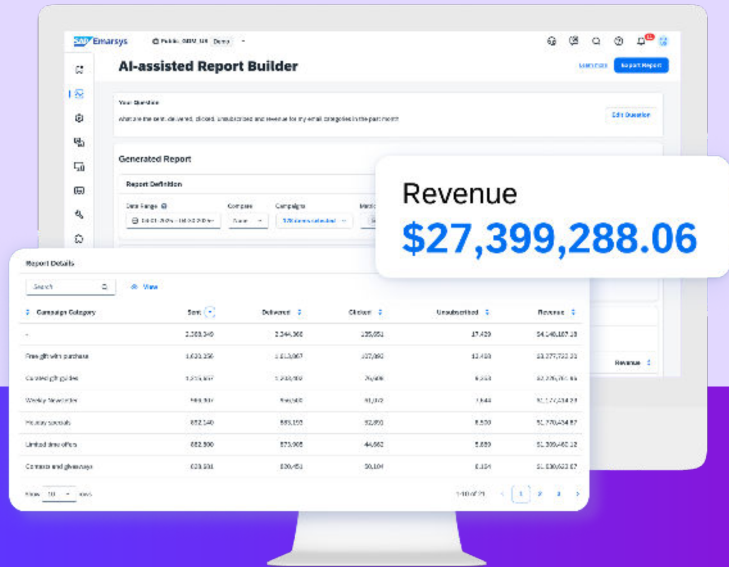
SAP Emarsys is empowering marketers with Gen AI

Are you spending excessive time building reports?
AI-Assisted Report Builder helps streamline reporting.
Generate on-demand reports based on key attributes like campaign type and category. Have AI deliver monthly reports and explore data with flexible filtering options.

How quickly can you find the exact product you need?
AI-Assisted Product Finder makes searching easy and fast.
Instead of manually searching through product lists, easily retrieve product catalog information using natural language commands. You can quickly find the perfect products to curate personalized product-based campaigns.

72%

of marketers say AI frees their team to focus on more creative objectives by reducing repetitive, time-consuming tasks.

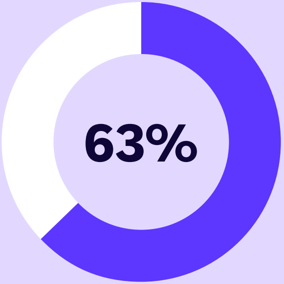


Power Your AI Marketing

Learn More

Data and Privacy

Consumers' data and privacy concerns



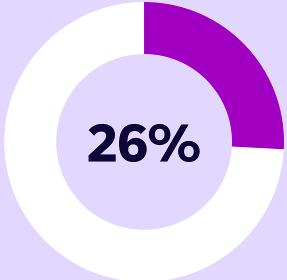
of global consumers are not confident in the data privacy of AI **(44% in 2024).**

Generational differences:

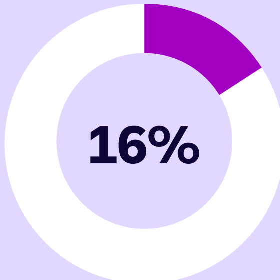
- Gen Z 53%
- Millennials 56%
- Gen X 64%
- Boomers 75%

Regional differences:

- 76% UK
- 64% Germany
- 63% US
- 60% Taiwan
- 40% UAE



of consumers feel that brands are not at all transparent about their use of personal data.



of consumers report a high level of trust in retailers to protect their personal information **(20% in 2024).**

Italian Market view

by Ecommerce Italia

E-commerce in Italy

Last year, e-commerce turnover in Italy reached **€85.4 billion euro**, recording a **6% increase** compared to the previous year. One third of this increase was driven by inflation, which fell from the peaks of previous years to **2.33%**.

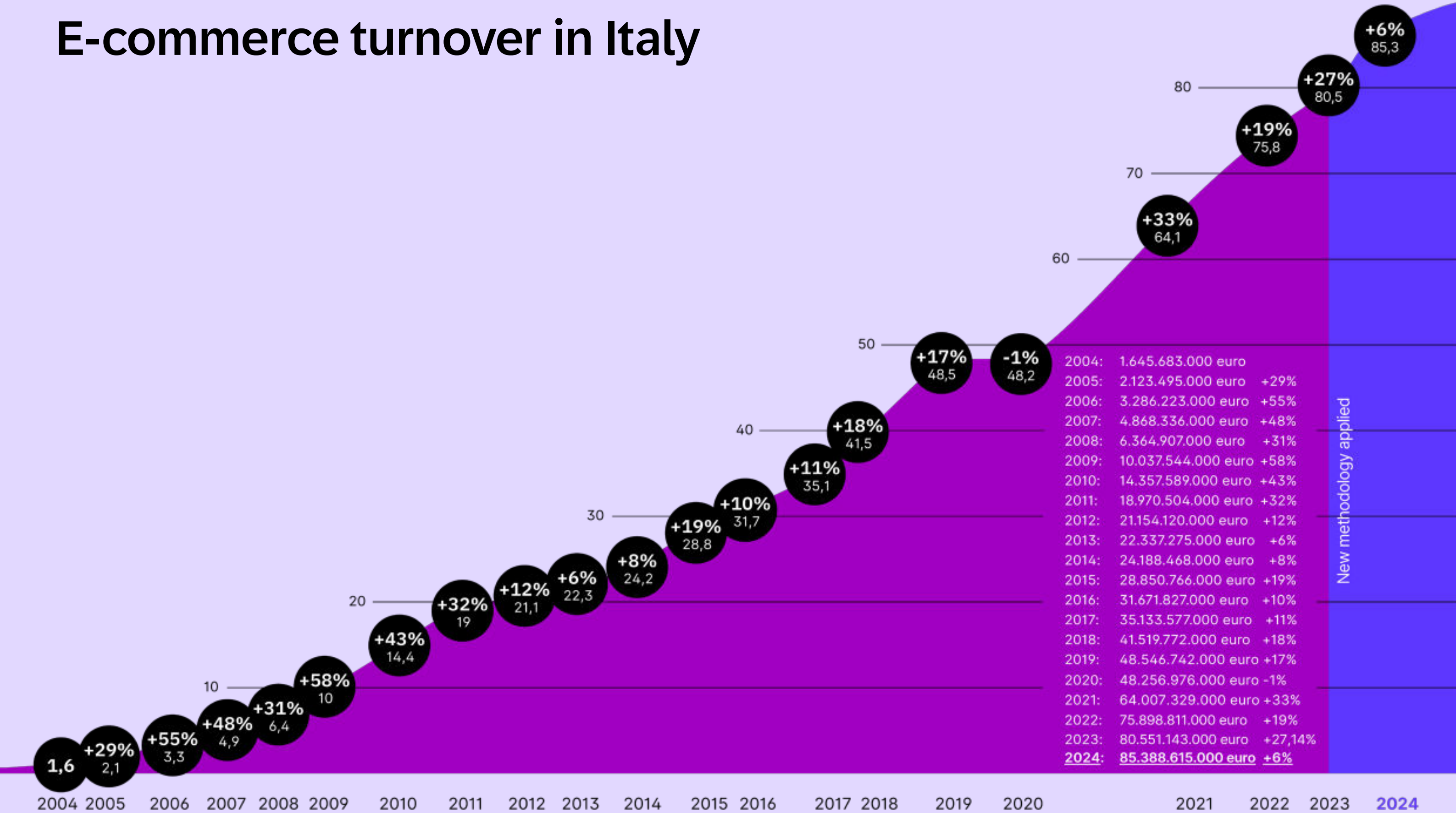
Last year can be seen as a year of **adjustment**, in which the economic crisis began to leave its mark on various sectors of digital commerce. **Publishing** suffered the sharpest decline, followed by the **children's and toys** sector. **Tourism**, on the other hand, maintained 2023 levels, but only thanks to the effect of inflation.

The combination of the need to ensure higher margins and the contraction in demand led to slower growth, with some sectors recording a decline in turnover or, at the very least, a reduction in the number of items sold.

85.4 billion

E-commerce turnover in Italy in 2024 (+6% vs 2023).

E-commerce turnover in Italy



Graph source: "*Ecommerce in Italy 2025*" Report, Casaleggio Associati

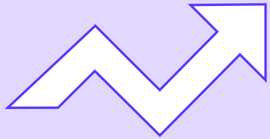
In 2024, Italian Ecommerce sites recorded average growth of **+6%**, which was lower than operators had expected.

The most significant slowdowns were concentrated in the sectors that had excelled in the previous year:

Marketplaces saw growth almost disappear (**+1% compared to +55% in the previous year**), as did **Travel and Tourism** (**0% after +42% in 2023**) and the **Animals sector** (**+7% vs +37%**).

However, the sharpest decline was in **Publishing**, which closed at **-14%**.

Nevertheless, there are still some rapidly expanding sectors that continue to drive the digital market: **Betting and Casinos (+31%), Cars and Motorbikes (+25%), Insurance (+17%)** and **Fashion (+16%)**.



+6%

Average growth of Italian E-commerce sites in 2024.

←

Looking ahead to 2025, companies' priorities are focused on several key objectives:

64%
aim to **increase profits and turnover** (stable compared to 65% in 2023)

45%
want to **increase brand awareness** (a sharp increase compared to 34% last year)

44%
aim to **increase customer loyalty** (vs 40%)

41%
aim to **acquire new customers**

23%
aim to **increase margins** and **gain market share**

12%
aim to **increase average order value**

2%
report other specific objectives

Graph source: "*Ecommerce in Italy 2025*" Report, Casaleggio Associati

The Future of AI

This year, marketers are using AI for:

46%	Automating more activities and campaigns
39%	Delivering new customer experiences
39%	Increasing customer engagement across existing channels
36%	Engaging consumers in new markets, regions, or sectors
36%	Reducing the complexity of the approach (e.g. streamlining tools, processes, etc.)
35%	Improving customer loyalty and retention
33%	Launching new channels for customer engagement

64%

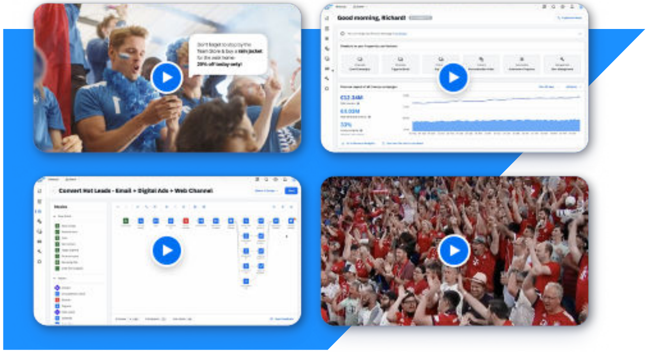
of marketers plan to invest more in AI in 2025 than they did the previous year.

Conclusion: Foundations for the Future

The data throughout this report shows how AI has become intrinsically woven into brand experiences. This expansion of AI will only increase as marketers partner with commerce, sales, and service teams to seek innovative ways to win lasting customer loyalty. Competition is fierce, and consumers have power in this Engagement Era — they know their own worth and have unlimited tools (and competing brands) at their fingertips when shopping.

Marketers must be more efficient and more effective at driving truly personalized, relevant experiences if they hope to achieve sustainable growth no matter what market disruptions come next. With over 80% of retailers worldwide using or transitioning to SAP, organizations are prioritizing a solid foundation by connecting their operational data with customer experiences. This leaves marketers to lead the charge to help unify customer data from various touchpoints and create AI-powered omnichannel experiences at scale. The real question that remains is ...

Are you prepared to take engagement to the next level?



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Put AI in motion
with the Personalization Playbook

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