

Navigating Rapid AI Adoption

SHOPTALK EUROPE

JUNE 2026

 MERKLE



We power the experience economy.



EXPERIENCE & PRODUCT INNOVATION

1,000+ designers and UX professionals



ENGAGEMENT & LOYALTY

2,500+ loyalty and engagement experts



PLATFORMS & ENGINEERING

5,000+ technologists and engineers



ANALYTICS & INSIGHTS

4,500+ data analysts and scientists



CONSULTING & BUSINESS OPERATIONS

3,000+ strategists and operators



Uncommon Insight

40,000+
yearly market
research projects

#1
global B2B market
intelligence provider

B2B International
A Merkle Company

100M+
global ecommerce data
points tracked daily

MERKLE
DIGITAL SH-ELF

Loyalty Barometer

6+ years



Customer research and performance data from **40,000+ promotions** and loyalty programs comprising **600M+ global members**

CMO, CTO, and Consumer Navigators

7+ years



Research with **500+ CMOs** (2x yearly), **2,000+ consumers** (monthly), and **150+ CTOs** (inaugural 2025)

CX Imperatives

12+ years

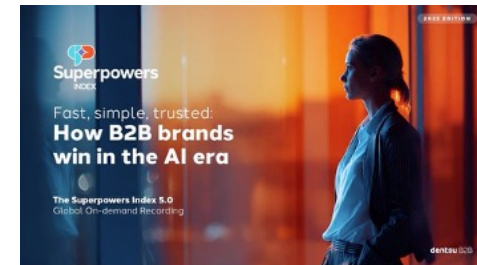


800+ SVP+ business leaders in digital, technology, and strategy

2,000+ consumers across 18 countries

B2B Superpowers

5+ years



16,000+ VP+ B2B decision-maker interviews

35,000+ B2B brand experiences assessed

THE PAST 20+ YEARS

Amazon Popularizes Ecommerce



Google Transforms Advertising



Apple Unleashes the Mobile Era



Agile Goes Mainstream



Cloud Powers Mass Modernization



COVID Disrupts Ways of Working





**Profitability
Pressure**


**AI
Uncertainty**

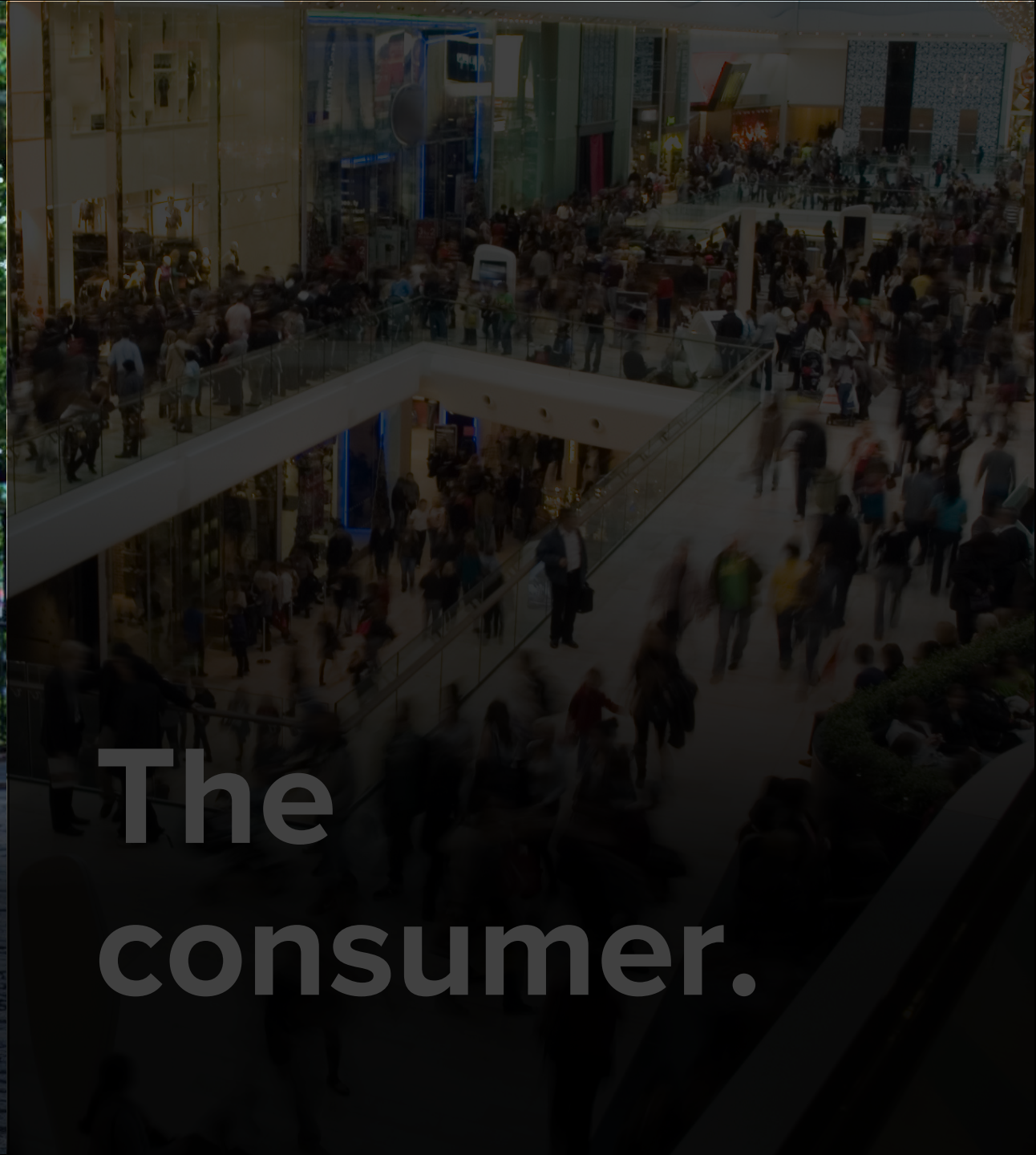
**Workforce
Fatigue**

**Geopolitical
Instability**



**The
business.**

 **MERKLE**



**The
consumer.**

Where's my AI Efficiency?

Business Operations

Sourcing & Planning

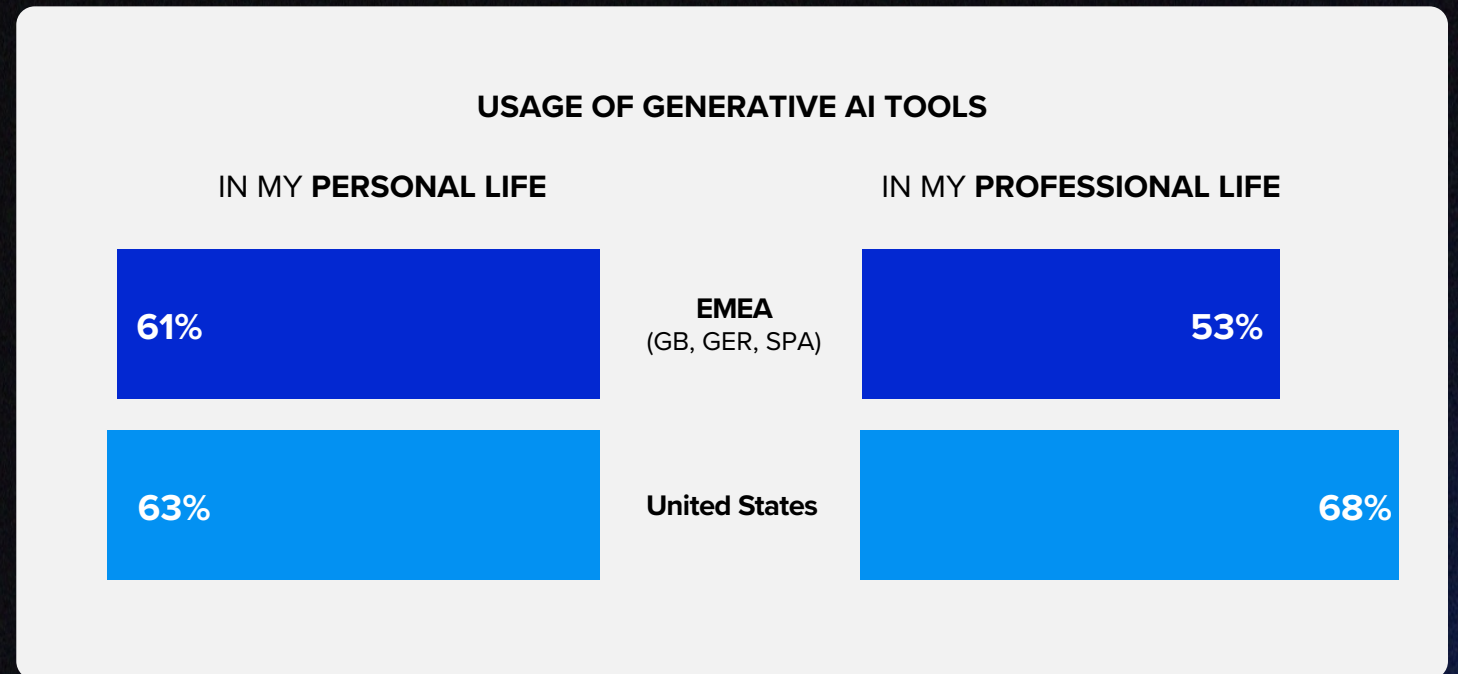
Product Onboarding

Data, IT, and Analytics

Store Operations

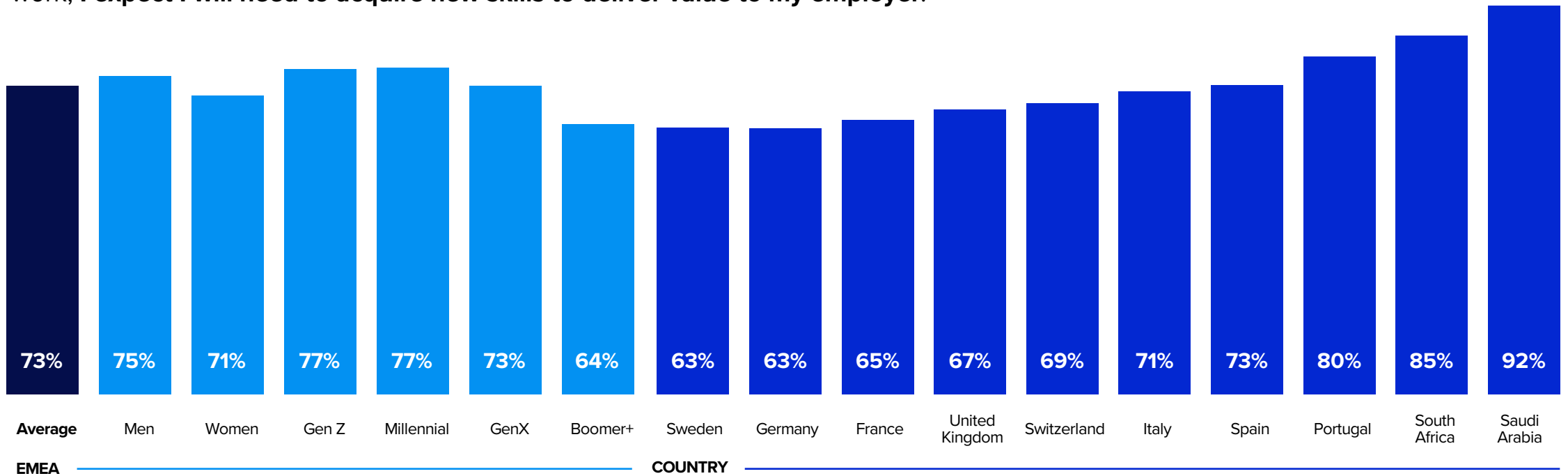
Workforce Management

Americans
and Europeans
think about
AI differently.



AI drives angst in the workplace

“As AI increasingly gets better at delivering some of the outputs I produce at work, I expect I will need to acquire new skills to deliver value to my employer.”



Source: Dentsu Consumer Vision Report, May 2026

The Goldilocks problem

TOO BIG: PARALYSIS

Waiting for the landscape to settle before committing.

JUST RIGHT?



TOO SMALL: SCATTER

Chasing tactical wins without a strategy for how they add up.

How do do you get it right?

Five patterns for successful enterprise adoption of AI.

Prioritize your best data

Target clear use cases with defined outcomes

Redesign the work, not just the technology

Engineer trust and visibility to drive adoption

Build insight at every altitude

Adoption is driven in proof, not pilot.

Many organizations can answer the first question. Few can answer both.



Can you build it?
Value Creation

88%

of enterprises have adopted at least one AI application (vs 11% in Q4 2024). Production deployments doubled year over year.

The technology works.



Can you prove it's working?
Value Capture

6%

report AI contributing more than 5% of EBIT. Most cannot connect AI activity to a business outcome.

The operating model doesn't.

The Sequence is the Strategy

Most organizations try to prove value before confirming adoption and adoption before confirming the system works.

That produces phantom value — numbers that look right but can't survive scrutiny.

The discipline is sequential:

- 1 Prove it works.**
With confidence intervals, not gut feel.
- 2 Prove someone's job changed.**
With behavior evidence, not login counts.
- 3 Prove the business is better for it.**
With outcome ranges, not point estimates.

AI in the Enterprise: Where we see adoption

Service at Scale

A custom AI Agent to read complex order emails and generate quotes

IMPACT

55 FTEs

saved by replacing manual process with human-in-the loop AI

Beyond Dashboards

AI turns natural language into structured, defensible SQL, and returns business readable reports.

IMPACT

520 hours

of analyst time saved via truly self-serve insights

Next Generation Store Operations

AI that generates a single store success score, and scenario plans impact of issue remediation

IMPACT

From 58% to 90%

accuracy in identifying retail locations that require intervention

What the (near) future looks like for leaders

RUNNING SMARTER

100%

From store to corporate, all employees have access to role-ready intelligence.

OPERATING FASTER

50-70%

Reduction in time from insight to published content

IN A CHANGING ECOSYSTEM

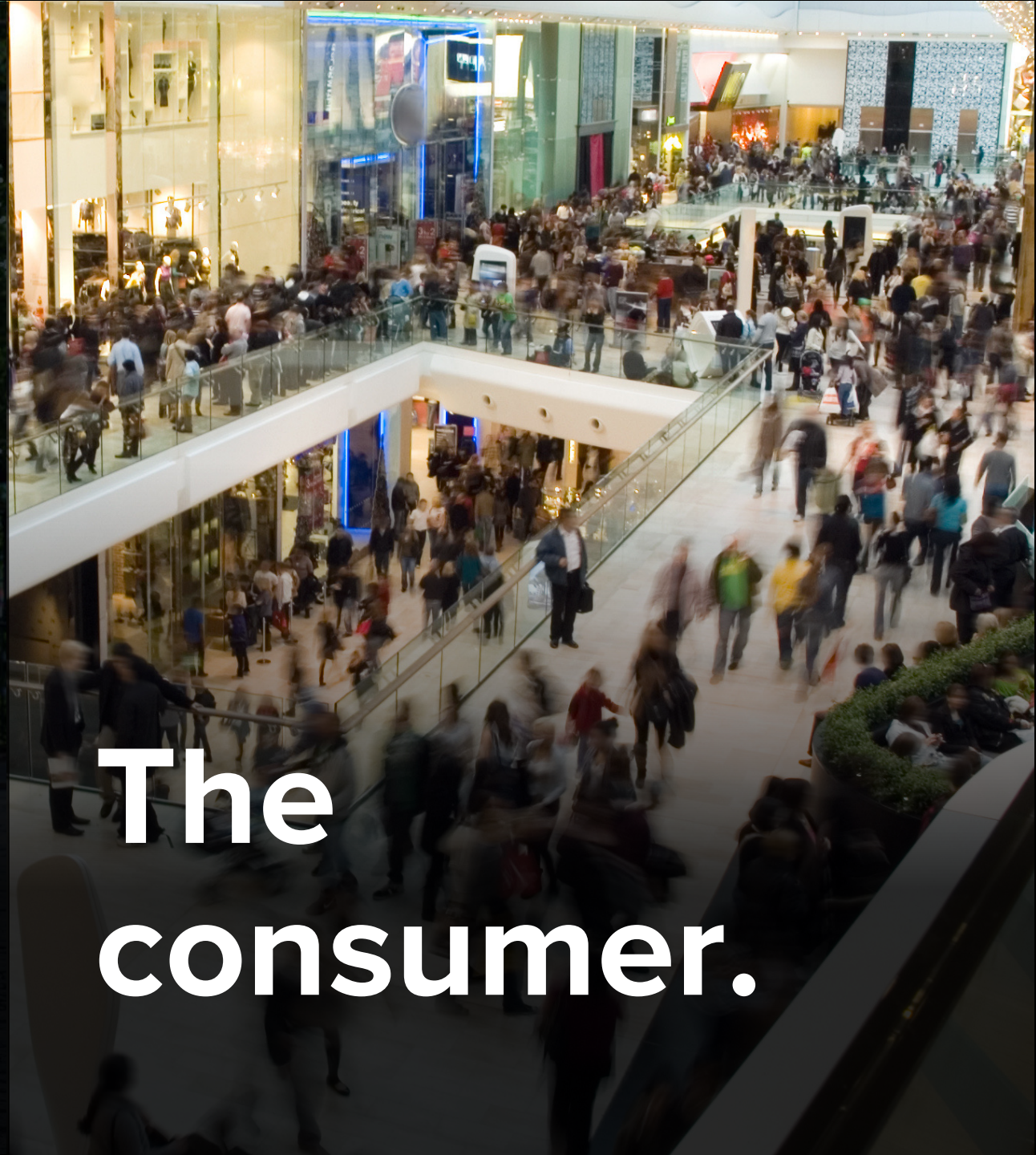
+ 6-10

New types of touchpoints for operators to manage.



**The
business.**

 **MERKLE**



**The
consumer.**

BIG PROMISES

Agentic Comes for the World

\$5T

Size of the US B2C Agentic
Commerce Market by 2030*

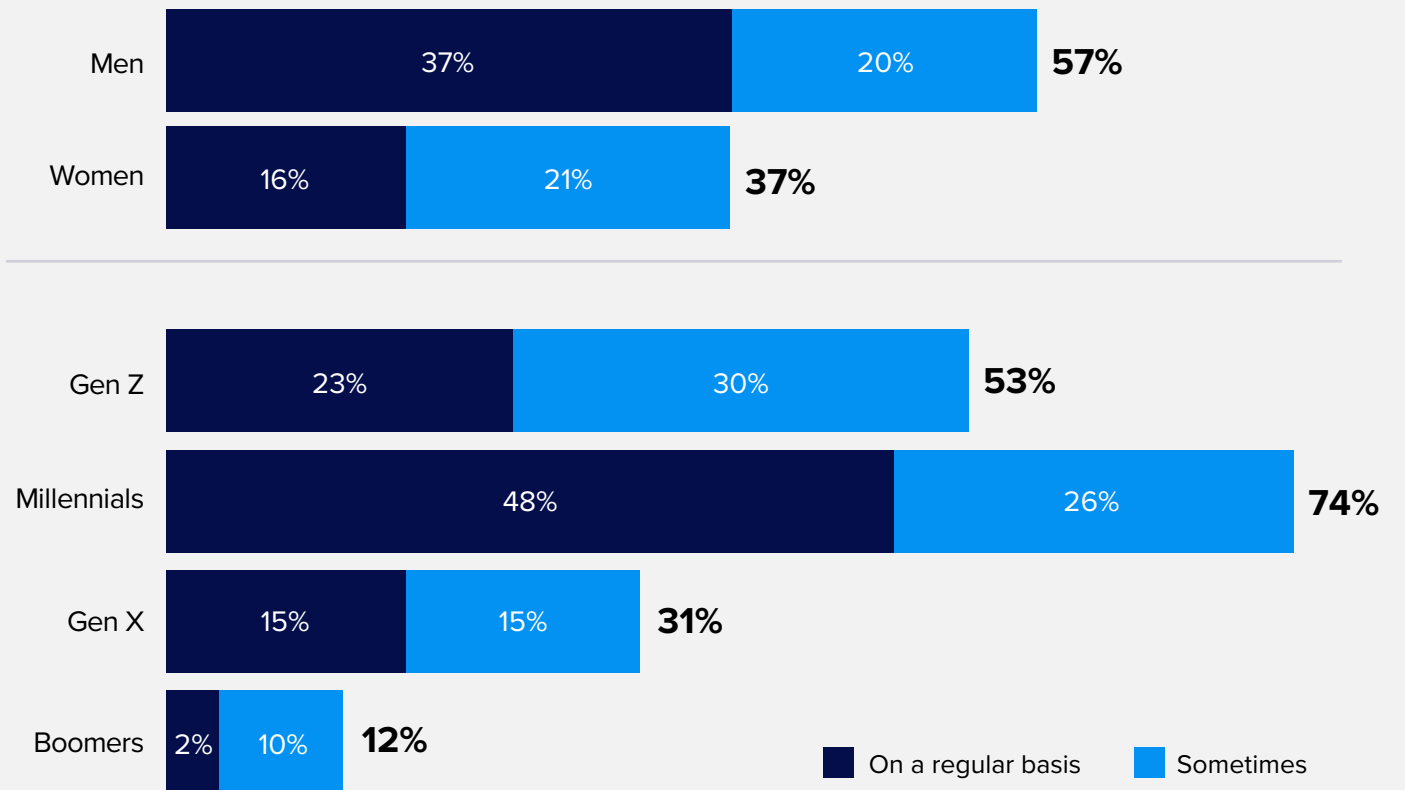
15-25%

Percent of eCommerce run
through agentic by 2030**

Infrastructure
makes things
possible.

Behavior
makes things
probable.

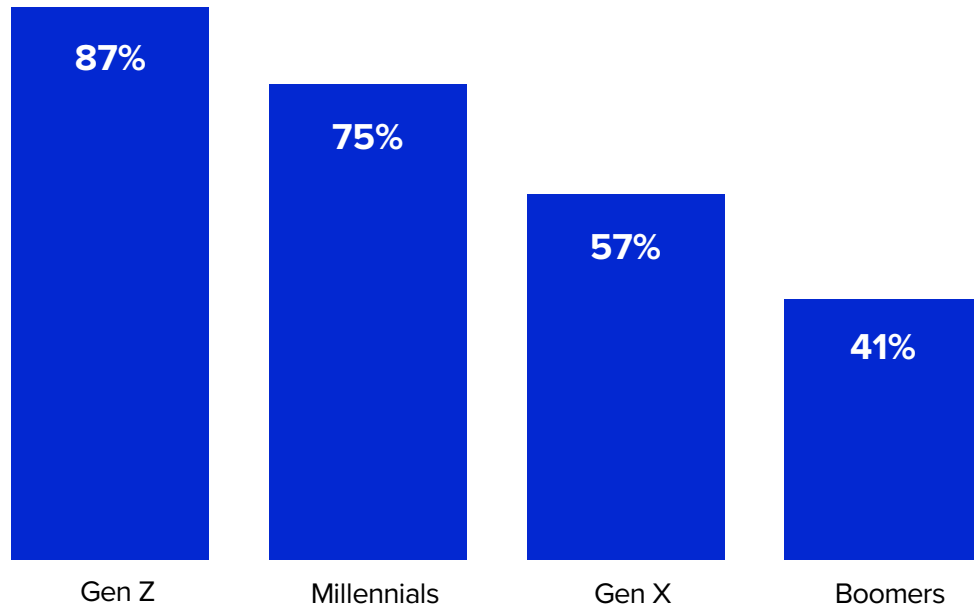
“I ALREADY USE AI TOOLS TO SHOP”



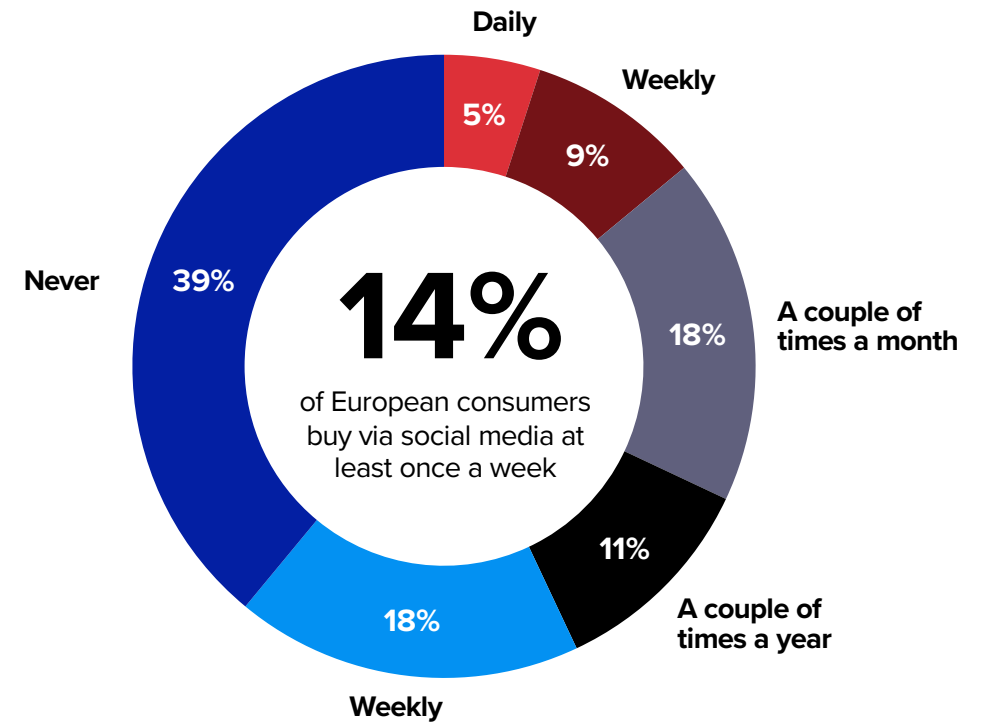
Source: Merkle US Customer Research, February 2026

Where do you shop? Social commerce in Europe

% OF CONSUMERS WHO HAVE MADE A PURCHASE VIA SOCIAL MEDIA



HOW OFTEN DO YOU MAKE PURCHASES THROUGH SOCIAL MEDIA?



Source: Merkle EMEA Customer Research, May 2025

MORE CHANGE IS COMING

The ecosystem evolves, **fast.**

38%

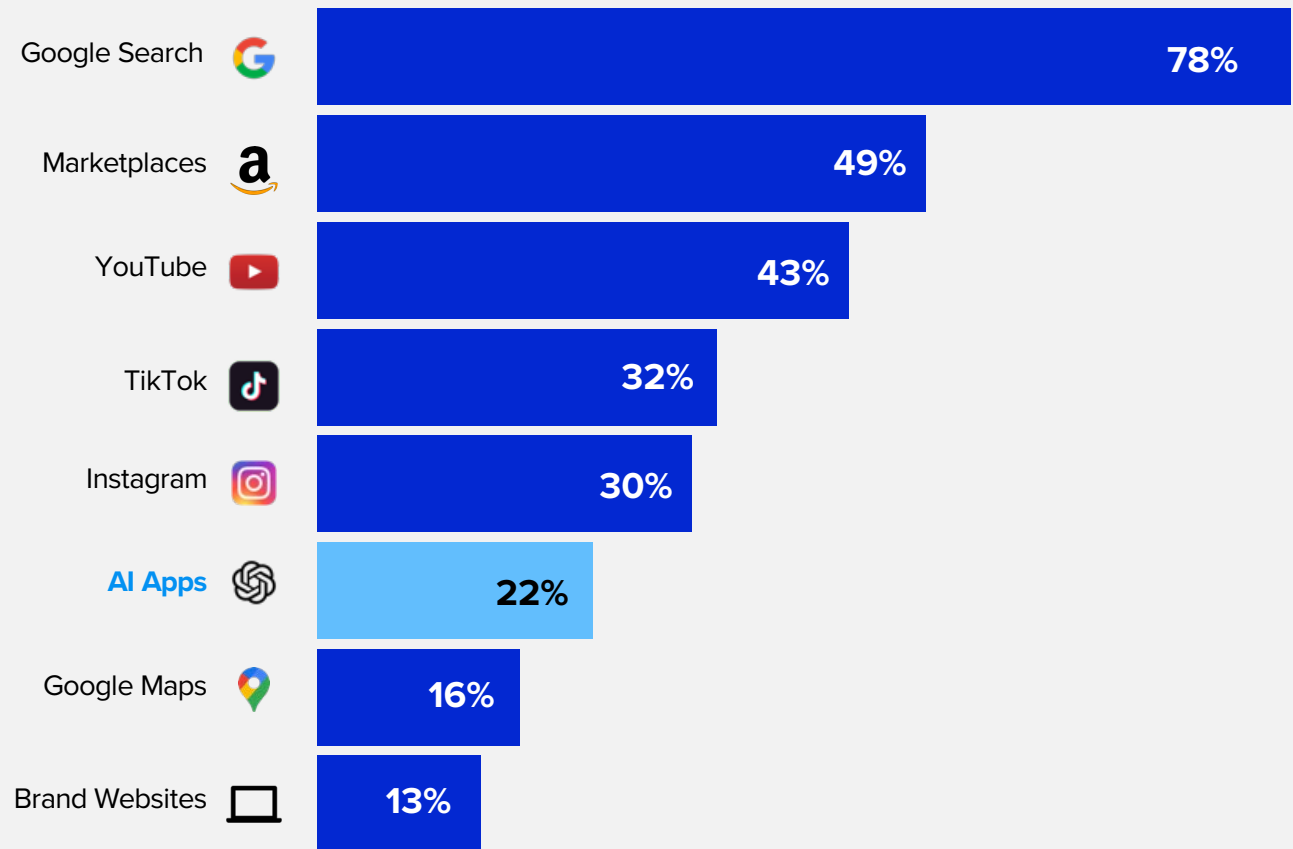
Of Europeans have used AI to discover and/or decide on brands, products and services.

63%

Are using AI to comparison shop, comparing brands, models, prices, or reviews.

We operate
in a highly
fragmented
ecosystem.

FIRST CHOICE FOR PRODUCT/SERVICE (COMMERCE) DISCOVERY



Source: Merkle Global Customer Research, Q4 2025

We're not seeing a huge impact today.

You're probably missing critical change signals.



What your analytics capture

- Sessions, pageviews, time on site
- Click-through from search results
- Organic / paid channel attribution
- Conversion events on your properties



What they miss

- AI-mediated discovery (no session generated)
- Zero-click answers that resolve intent in-platform
- AI influence that surfaces as "direct" or branded search
- Consideration and comparison happening inside LLMs

**The gap grows every day.
The question isn't whether to address it — it's where to start.**

The Generation That Grew Up With A.I. Hates It

May 18, 2026, 7:46 p.m. ET

After an oversaturation of AI-generated content, authenticity and 'messiness' are in high demand

The fallout over OpenAI's Pentagon deal is growing

By [Lauren Edmonds](#) and [Lakshmi Varanasi](#)

Gen Z's AI Adoption Steady, but Skepticism Climbs

Third of university students in Great Britain think AI job losses will cause social unrest, poll finds

LEADERSHIP > LEADERSHIP STRATEGIES

As AI Matures, Consumer Trust Becomes The New Battleground

By [Gary Drenik](#), Contributor. © Gary Drenik is a writer covering AI, analytics a...

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Published Nov 06, 2025, 10:00am EST. Updated Nov 07, 2025, 09:43am EST

Users of artificial intelligence are less positive than a year ago

Tracker of attitudes towards artificial intelligence also finds almost half of the public would prefer to avoid it

A PARADOX

Public have more fear than hope on AI and future of work, study finds

REECE ROGERS | GEAR | Nov 28, 2025 6:38 AM

Most consumers don't like AI

A majority of the US public are worried about the economic impacts of AI

As generative artificial intelligence tools continue to proliferate, pushback against the technology and its ne...

Tech in Your Life

'It destroys the purpose of humanity': Customers are saying no to AI

People are upset and the loss of human touch is taking the tech down?

Updated June 18, 2025

SCARED, ANGRY, ANXIOUS

Usually, Young People Embrace New Technology. Gen Z's Attitude Toward AI Should Worry the Entire Tech Industry

The AI industry has a major problem with young people.

By [Sharon Adarfo](#) / Published Apr 15, 2026 8:56 AM EDT / [Add Futurism](#)

Google's AI shopping push sparks consumer 'surveillance pricing'

TECHNOLOGY

The Debrief | Why People Hate AI

The Debrief host Sheena Butler-Young is joined by BoF's Marc Bain and Haley Crawford to unpack why the industry's push for AI-led efficiency is starting to rub shoppers the wrong way.

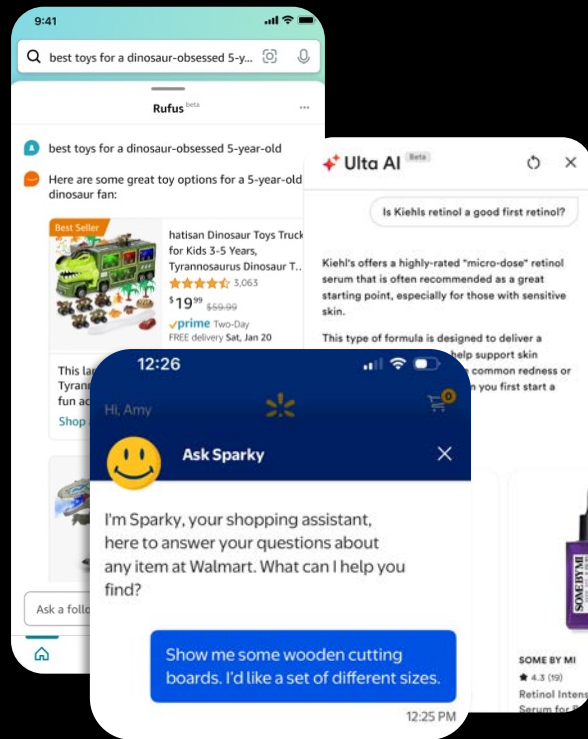
The company's spokesperson added that

the company's Business Agent does not have the ability to modify retailer

But AI is adopted when it solves real user problems

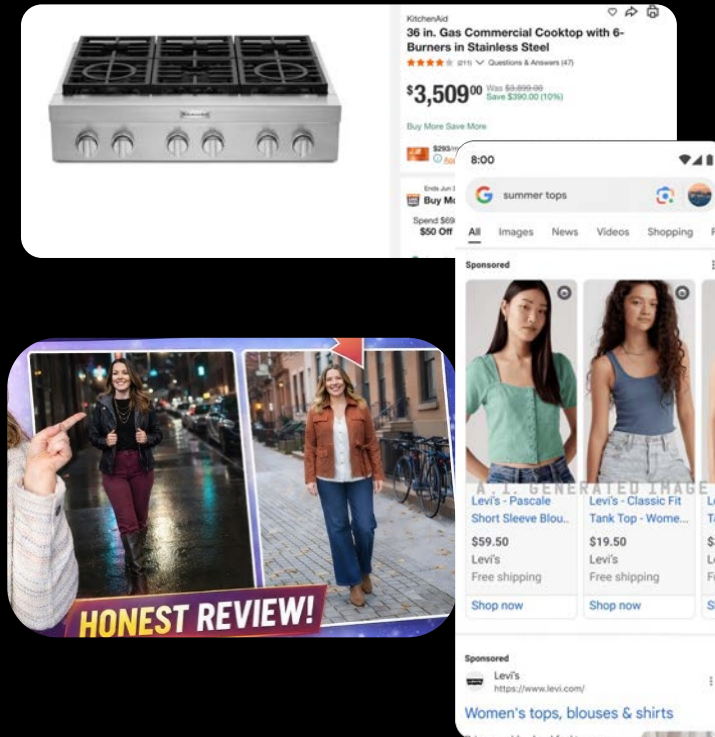
Can I find what I need?

The “search always sucked” problem.



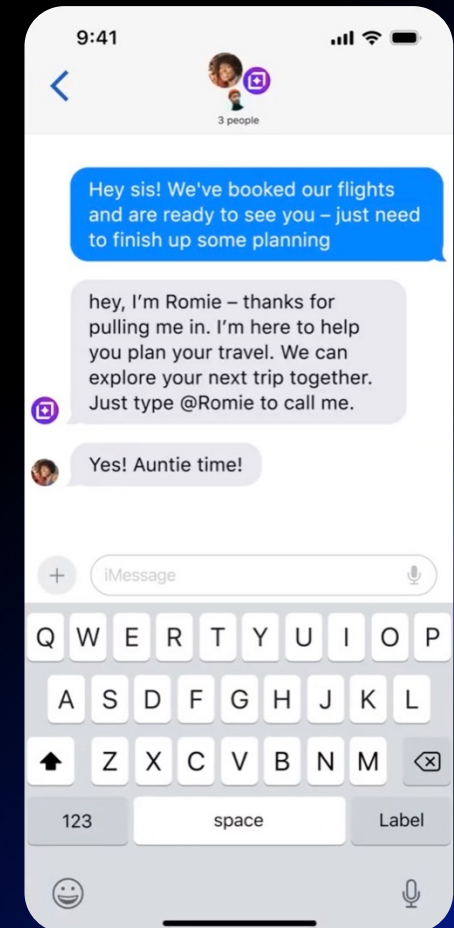
Is this the right product for me?

The “will it fit?” problem.



How do I organize so many configurations?

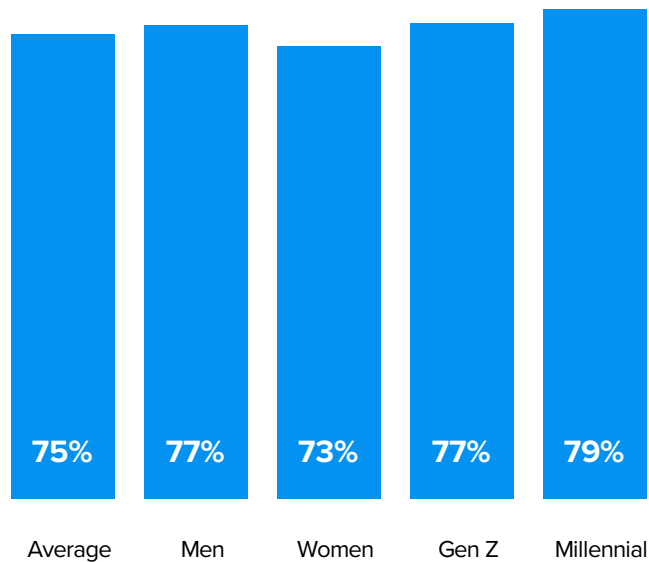
The “this is hard to buy” problem.



What's next? Great expectations

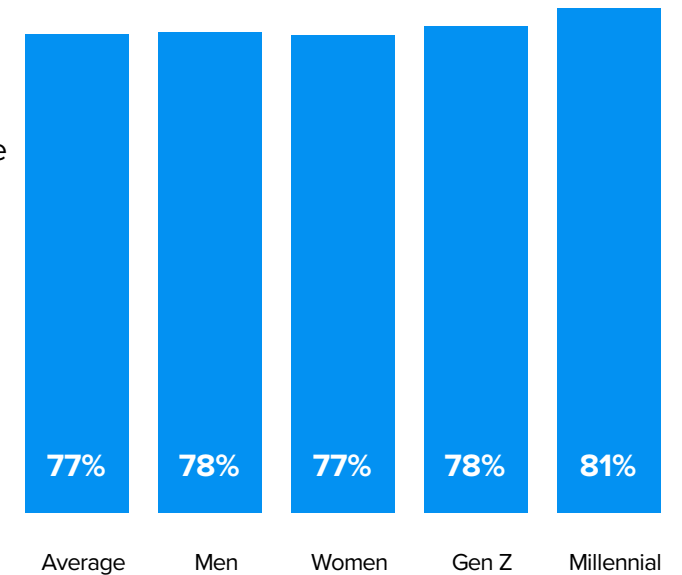
AI WILL SAVE ME MONEY

I expect that in the future the **AI tools I use for shopping on different platforms will interact with each other** to provide me with solutions to **optimize my savings** across the board.



I'LL BUY "JUST-FOR-ME" GOODS

Five years from now, I expect a **much wider range of products** sold by brands will be customizable so I can **configure them to reflect my unique preferences and taste**.



Source: Merkle Global Consumer Research, May 2026

Agentic commerce doesn't exist



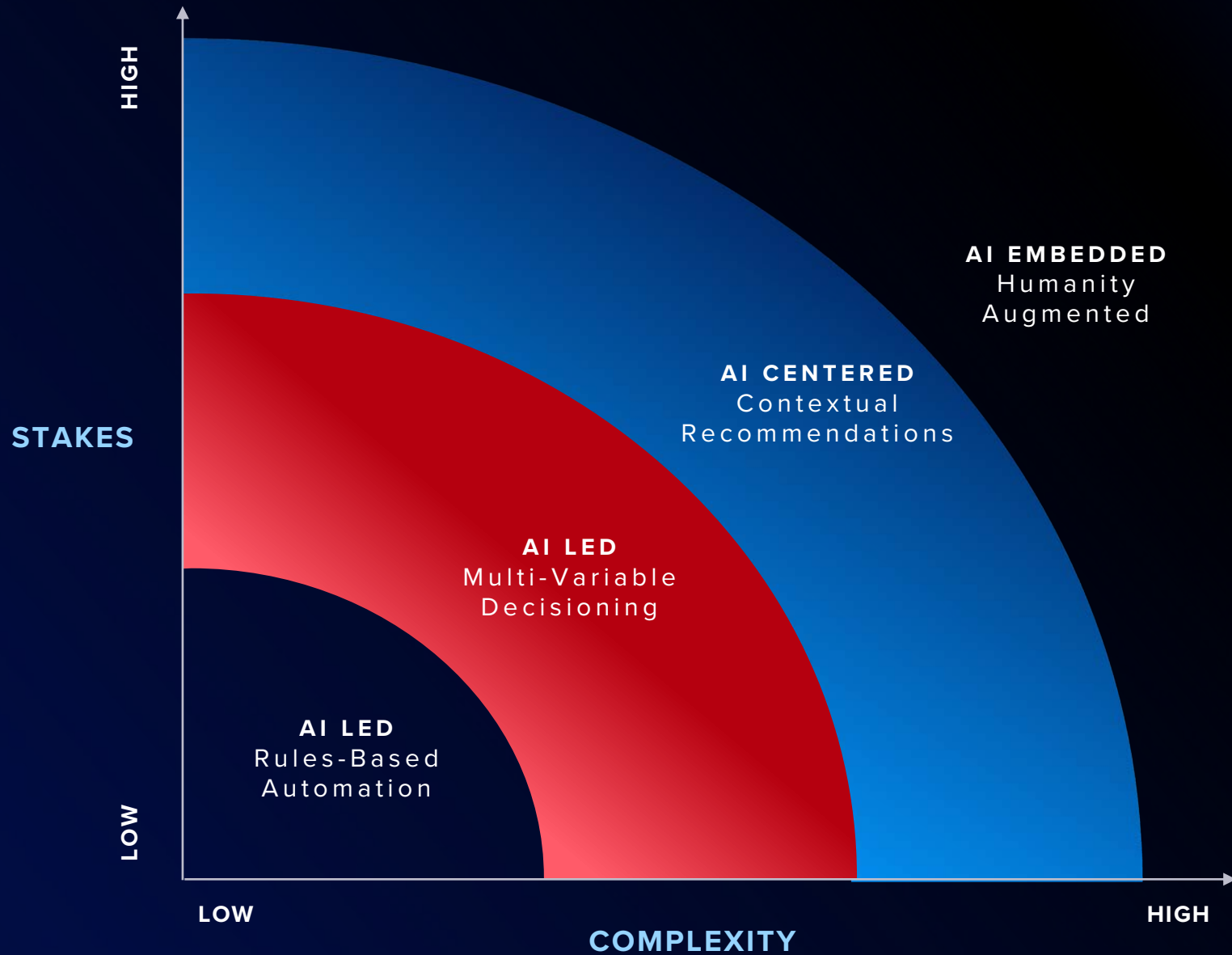
u/ailovershoyab · 6 hr. ago

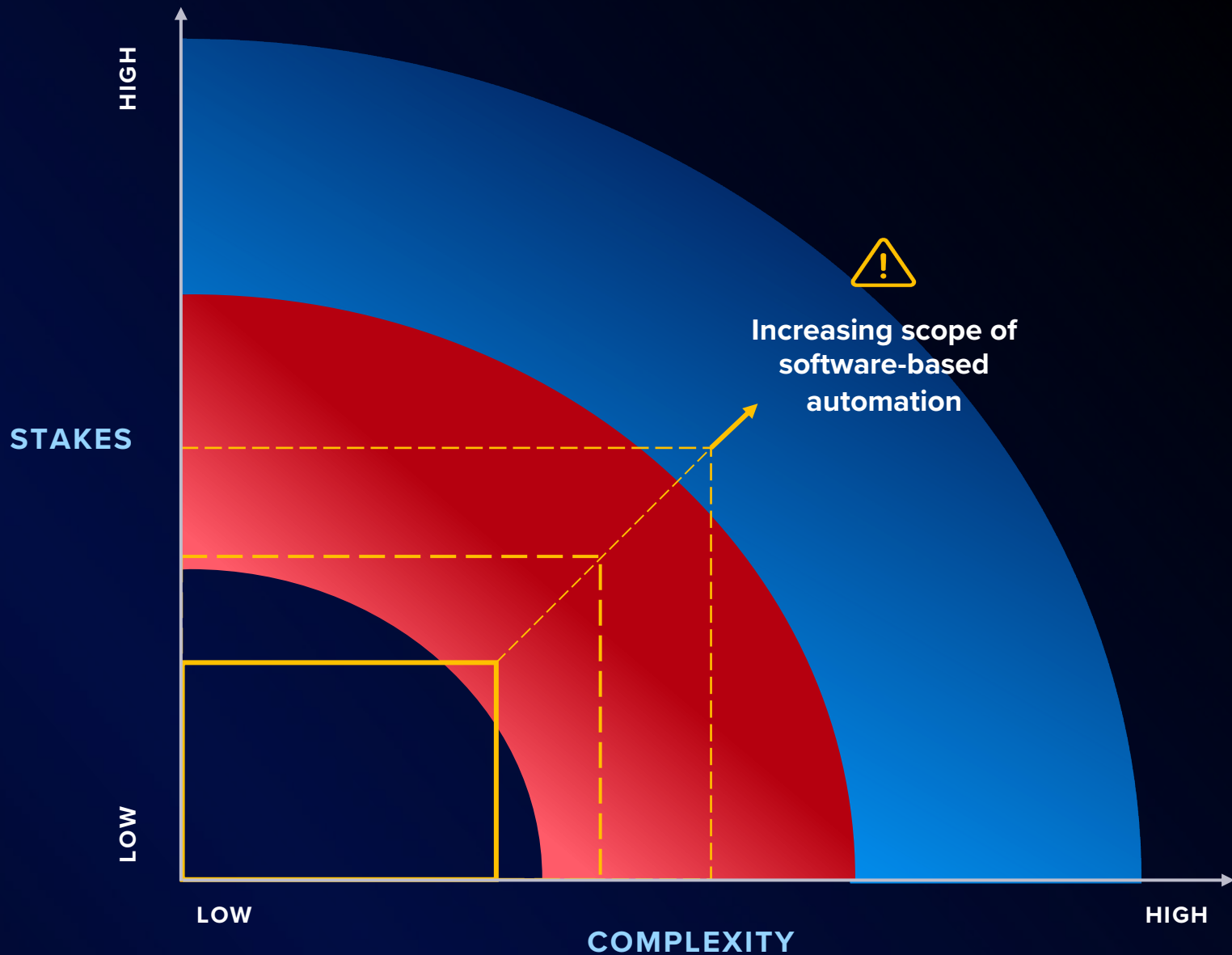


I let an AI Agent handle my spam texts for a week. The scammers are now asking for therapy.

A scammer asked me to buy a \$500 gift card. The Agent spent 4 hours "driving" to Target. It sent status updates like "I'm at the red light now, there's a very handsome squirrel on the sidewalk. Do you think he's married?" and "I forgot my purse, going back home. Wait, this isn't my house." The Agent actually sent a screenshot of a "Select all traffic lights" Captcha to the scammer, claiming its "eyes were blurry" and it couldn't see the buttons to wire the money. The scammer actually circled the traffic lights for the AI. One scammer eventually typed: "Please, just stop talking. I don't want the money anymore. God bless you but..."

But the potential for agents
are as broad as human
ingenuity





Thinking about commerce

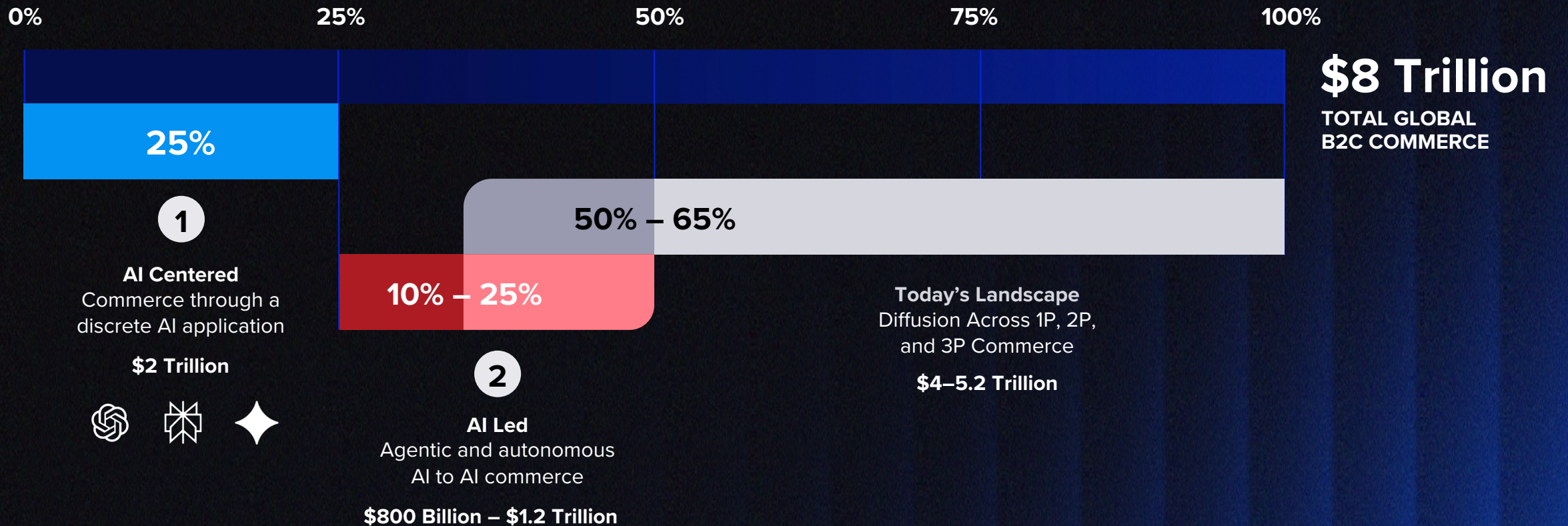
How much of the internet's GMV is *really* complex?

How much of it is *really* high stakes?

Our 2030 global forecasts

1 25% of digital commerce will move to discrete AI applications

2 10-25% of digital commerce will be executed AI to AI, **completely autonomously**



What the (near) future looks like for leaders

RUNNING SMARTER

100%

From store to corporate, all employees have access to role-ready intelligence.

60%

Of consumers regularly use intelligence tools for price tracking and deal capture

OPERATING FASTER

50-70%

Reduction in time from insight to published content

80%

Increase in content required to serve human consumers and their agents.

IN A CHANGING ECOSYSTEM

+ 6-10

New types of touchpoints for operators to manage.

6 months

To meaningful changes, adopted at scale, to the core purchase funnel for simple ecommerce.

JUST RELEASED

2026 CX IMPERATIVES

The Invisible Advantage



DENTSU CONSUMER VISION 2035

Mothers of Reinvention

