

Top 5 AI Trends Transforming Holiday Shopping

Adobe



Today's speakers



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Principal Content Strategist
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Agenda

- 2025 US holiday shopping forecast
- Top 5 AI trends transforming holiday shopping
- 2026 and beyond: AI New Year's resolutions
- Q&A and resources



2025 US holiday shopping forecast



Vivek Pandya

Director, Adobe Digital Insights
Adobe

Methodology



Only industry report that measures direct consumer transactions

- Over 1 trillion visits to US retail websites
- 100 million product SKUs, across 18 product categories
- Adobe Analytics is the leading data insights tool for retailers



85 of the top 100* US internet retailers use Adobe Experience Cloud to power their digital business

- Only Adobe can access a high volume of consumer transactions
- Data is aggregated and anonymized to provide insights

Complementary survey based on responses from 5,000 U.S. consumers, fielded between September 9th and September 16th, 2025

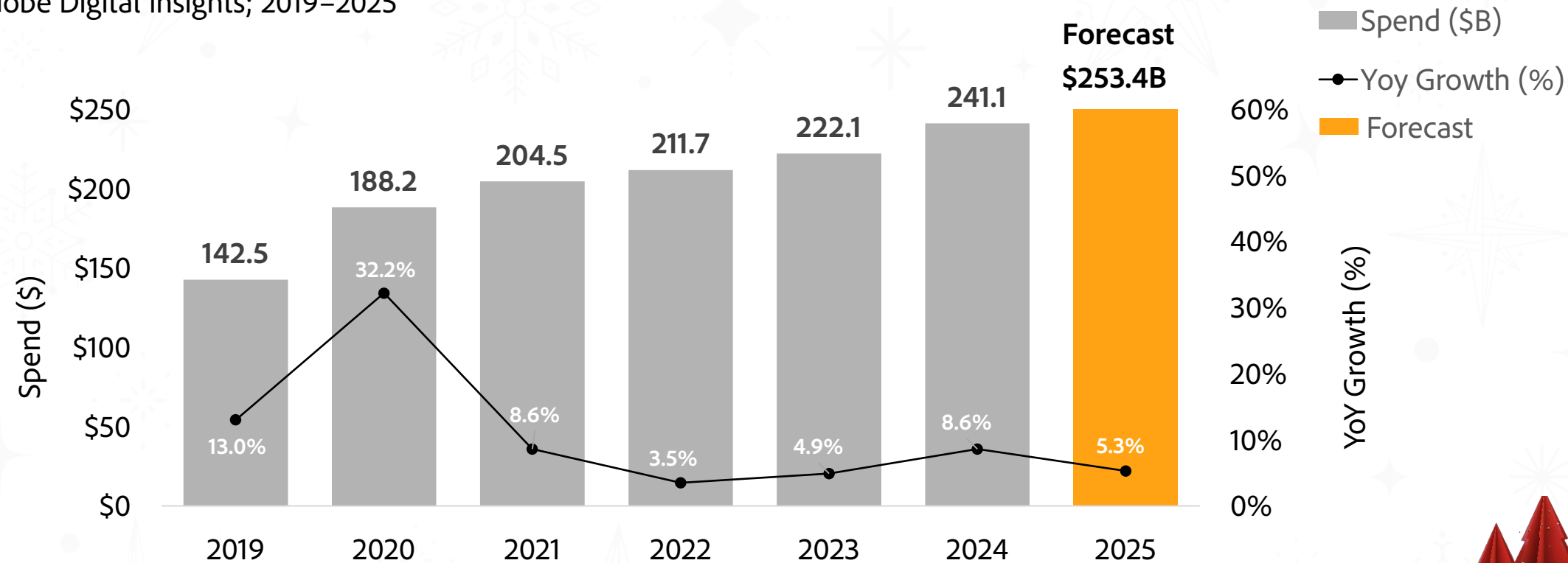
Disclaimer: The information and analysis in this release have been prepared by Adobe Inc. for informational purposes only and may contain statements about future events that could differ from actual results. Adobe Inc. does not warrant that the material contained herein is accurate or free of errors and has no responsibility to update or revise information presented herein. Adobe Inc. shall not be liable for any reliance upon the information provided herein.

*Per the Digital Commerce 360 Top 500 Report (2021)

2025 Holiday season online spending to cross \$250 billion

Holiday Season Forecast 2025

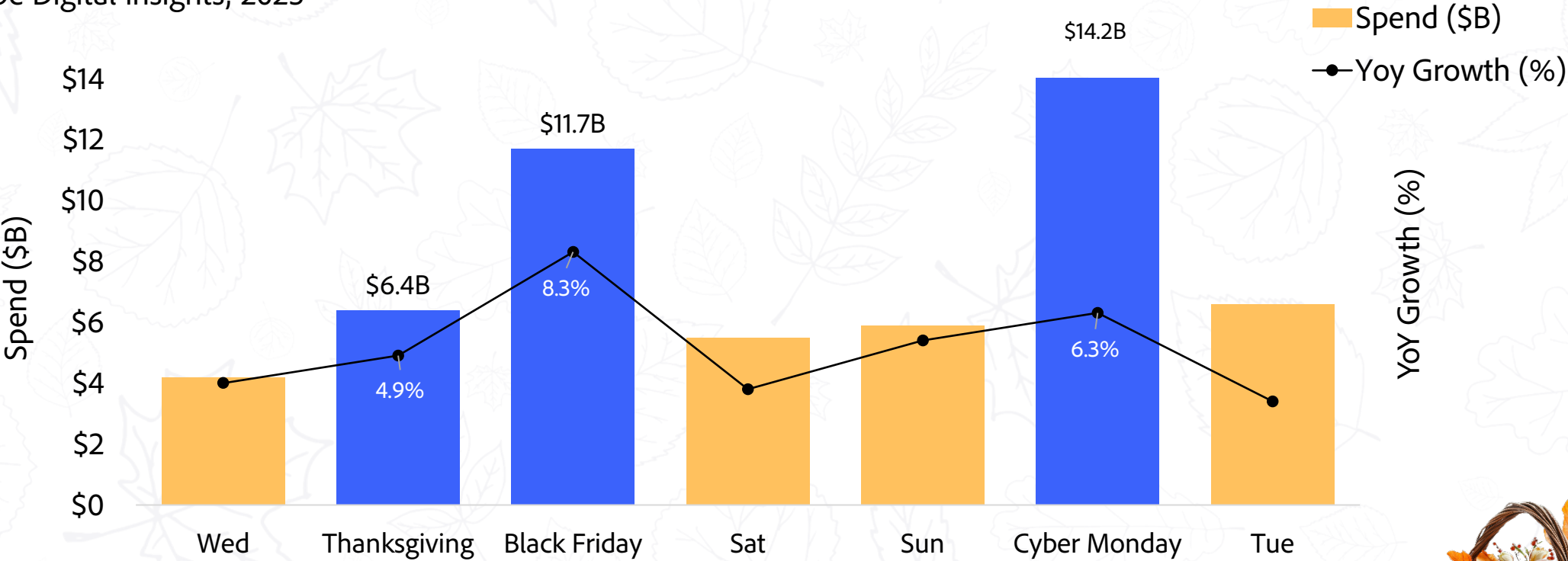
Adobe Digital Insights; 2019–2025



Black Friday gains share of Cyber Week growth

Cyber Week Forecast

Adobe Digital Insights; 2025

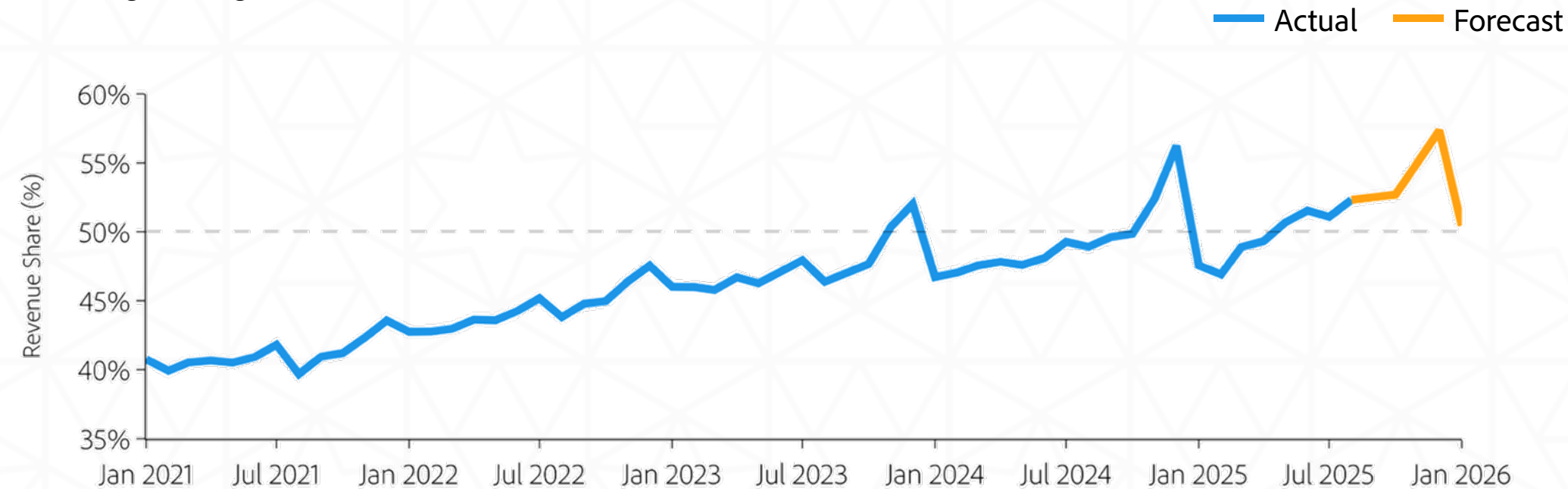


Mobile-first holiday closes out first mobile-first year



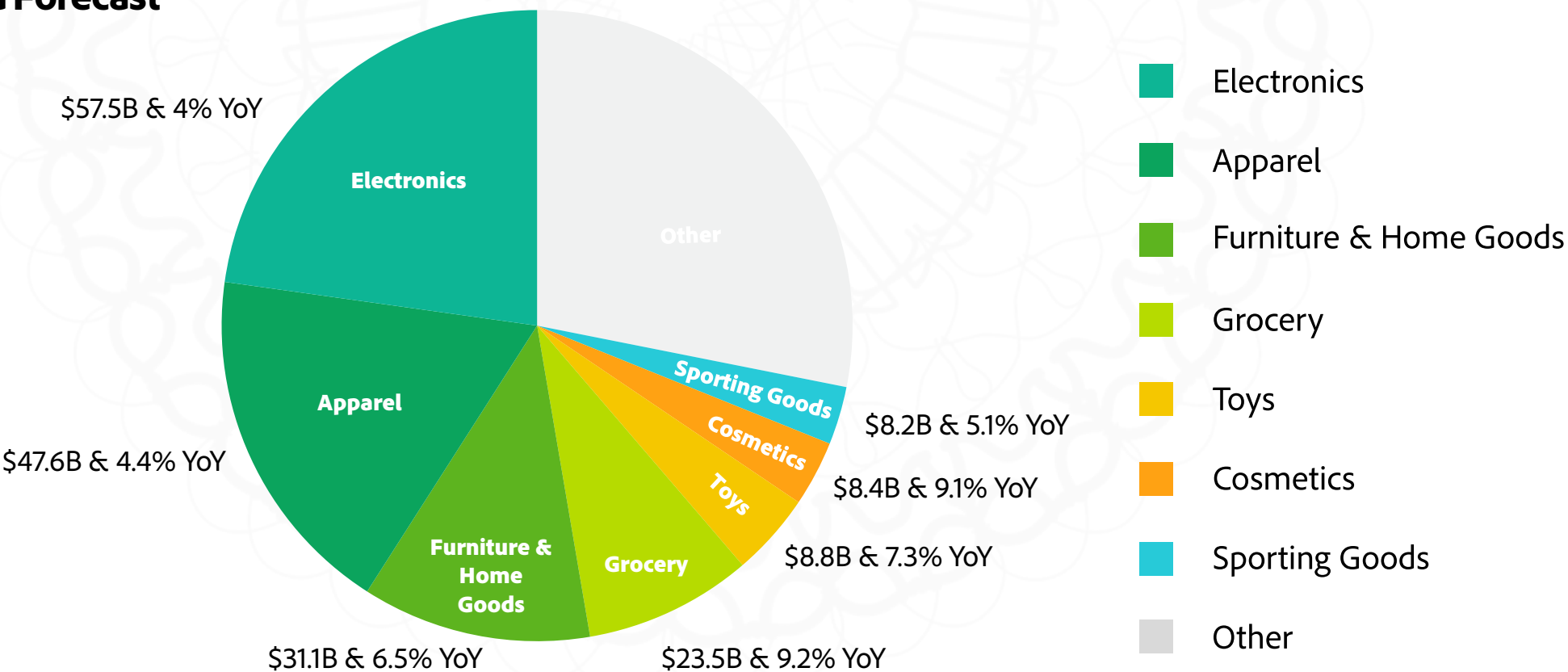
Mobile Revenue Share Forecast

Adobe Digital Insights; 2021–2025



Varied growth expected from major categories

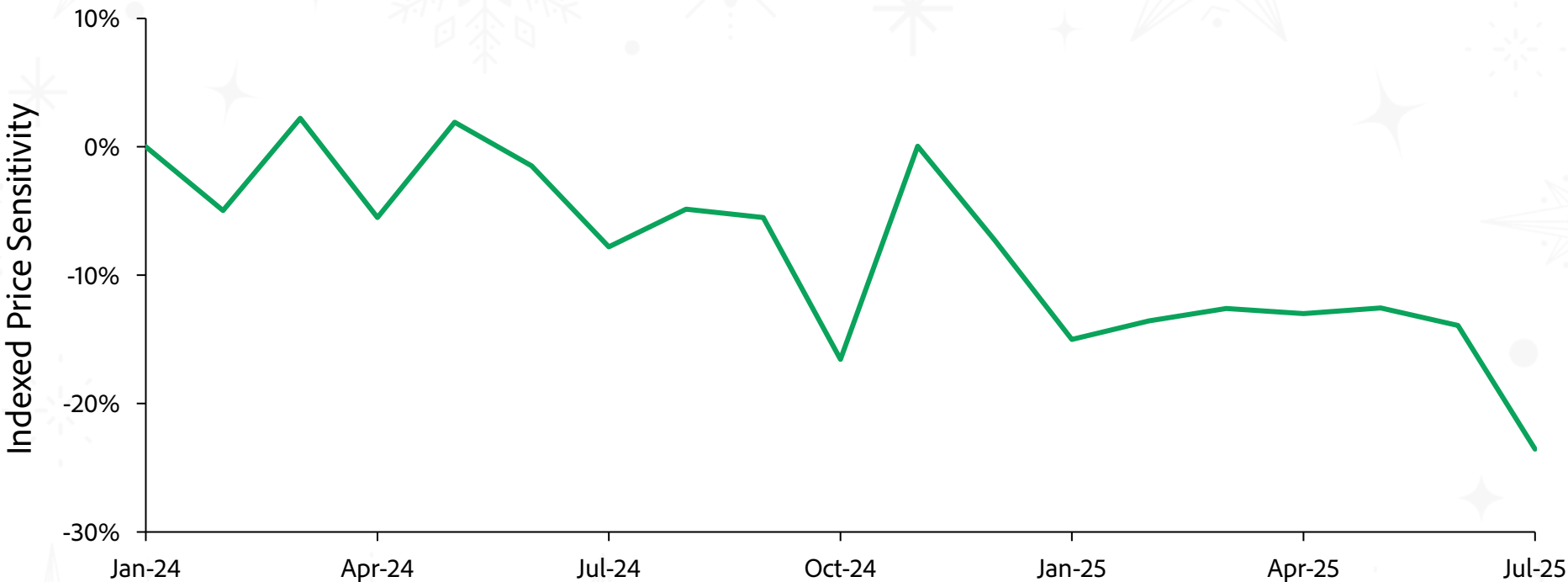
Online Spend Forecast
by Category



Price sensitivity eases, promotions still fuel growth

Online Price Sensitivity Index (Indexed to Jan 2024)

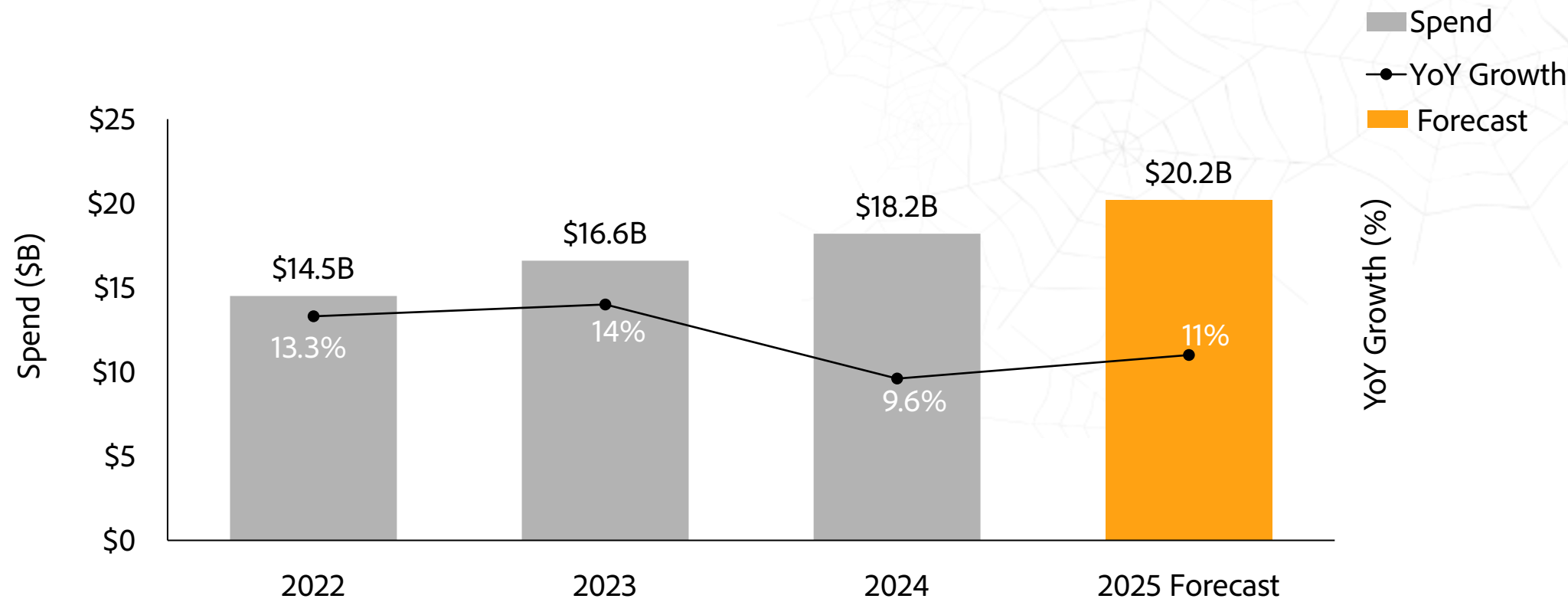
Adobe Digital Insights; 2024–2025



Buy now, pay later! Momentum builds ahead of holidays

BNPL Holiday Season Forecast

Adobe Digital Insights; 2025

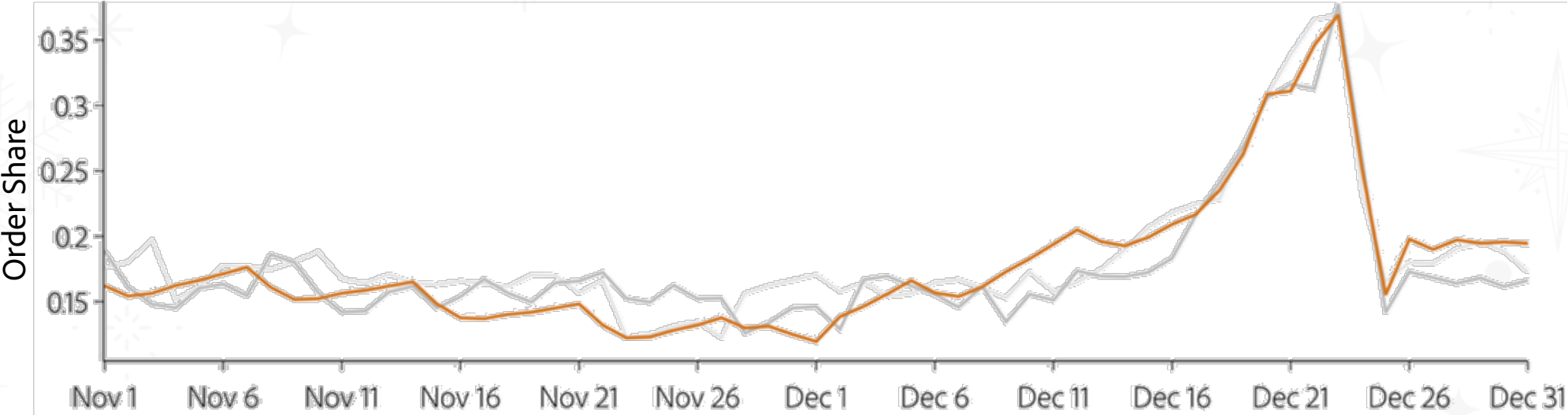


Last-minute holiday gifts drive curbside pickup

BOPIS Order Share During the Holiday Season

Adobe Digital Insights; 2023–2025

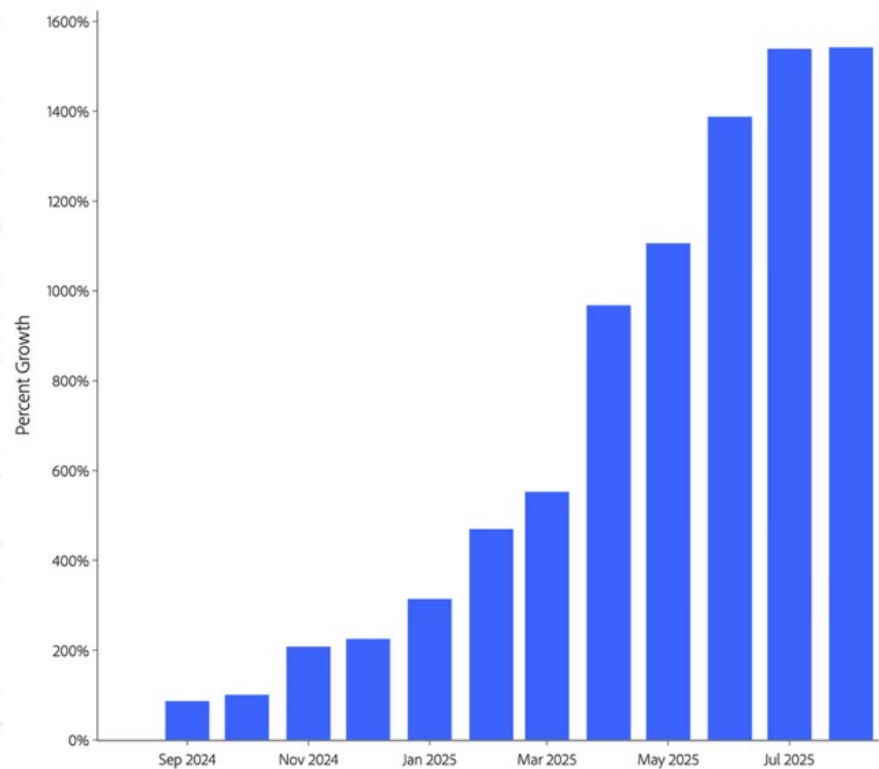
- 2023
- 2024
- 2025 Forecast



Generative AI traffic surges as assistants reshape shopping

Growth in AI-Driven Visit Share (Retail)

Adobe Digital Insights; August 2024–August 2025



Reported AI Purchase Satisfaction

Adobe Consumer Survey; Aug 2025



■ Satisfied ■ Not Satisfied



AI traffic: Desktop leads, mobile rising

Monthly AI Mobile Visit Share

Adobe Digital Insights; January 2025–Present



AI conversion surpasses traditional conversion

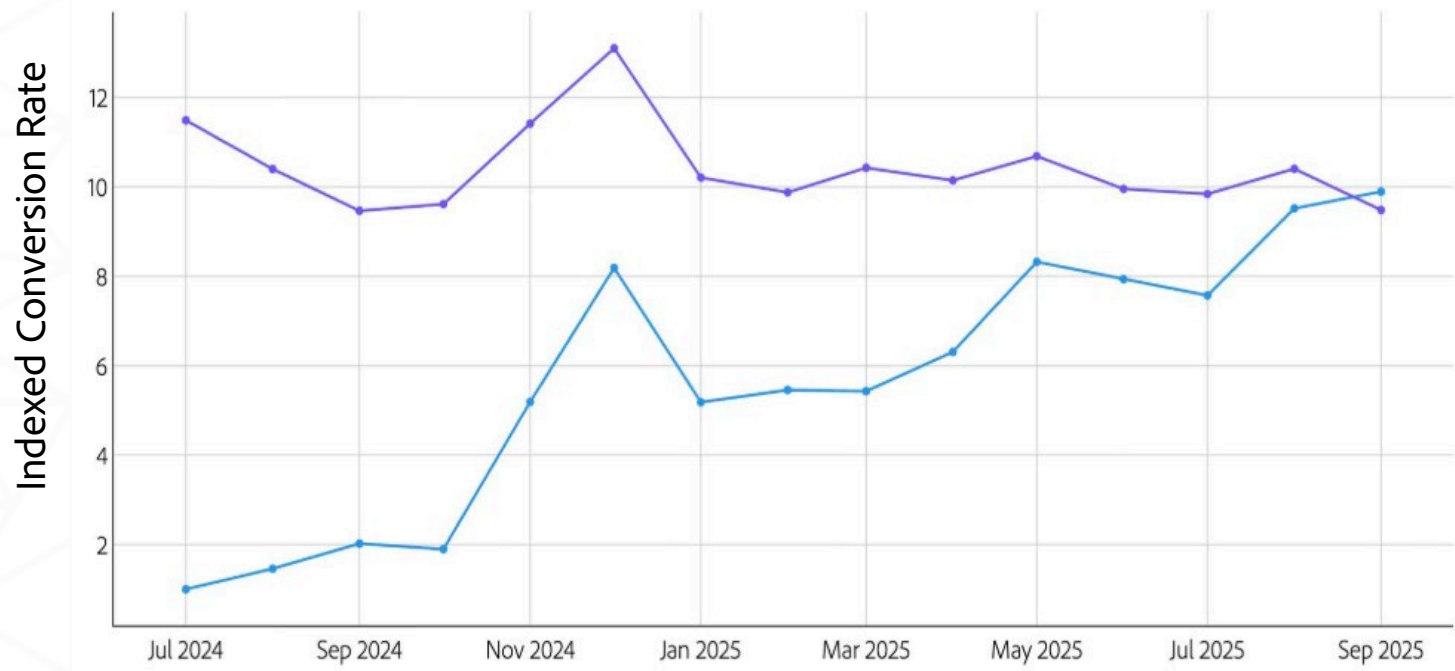


Monthly AI vs Non-AI Conversion Rate (Retail)

Adobe Digital Insights; July 2024–September 2025

Referral Type

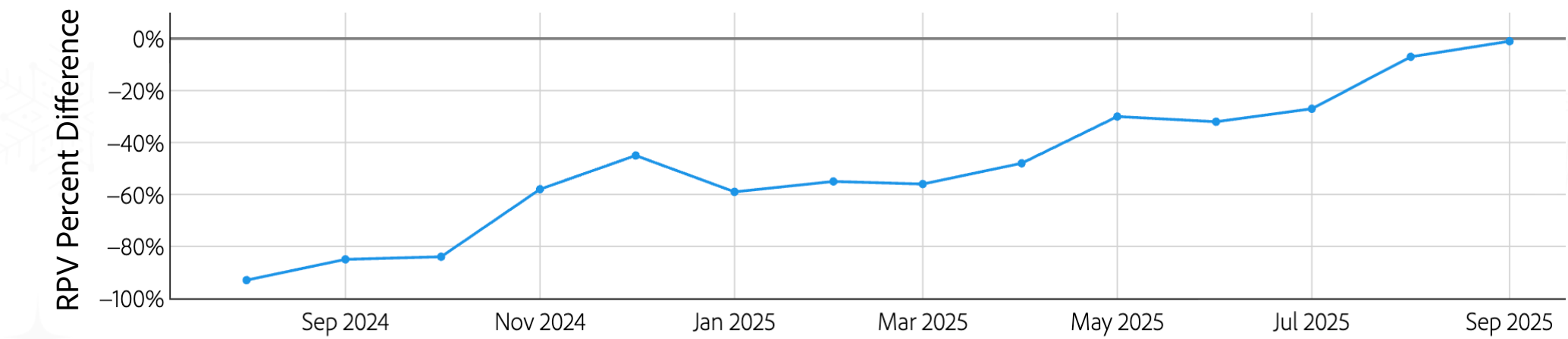
- AI Conversion Rate
- Non-AI Conversion Rate



AI visits are worth as much as non-AI visits

Monthly AI vs Non-AI Revenue Per Visit Percent Difference (Retail)

Adobe Digital Insights; August 2024–September 2025

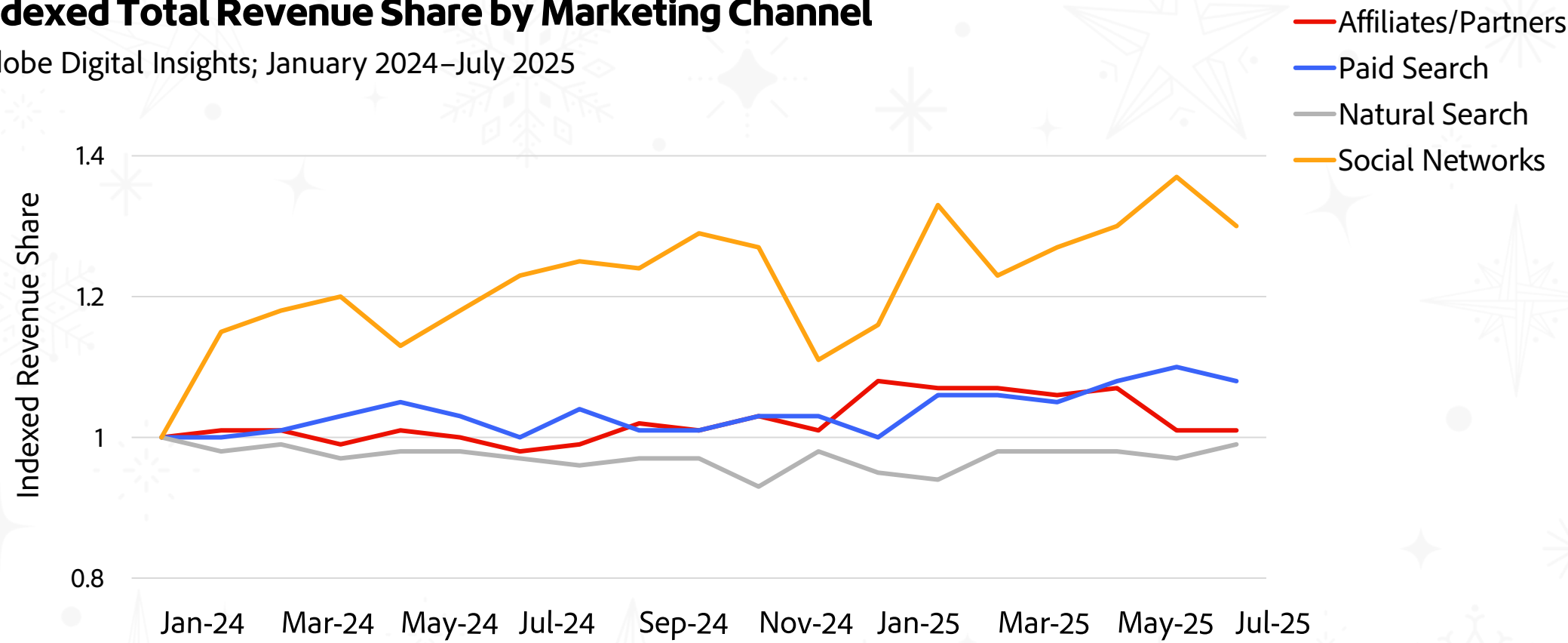


Marketing channels forecast



Indexed Total Revenue Share by Marketing Channel

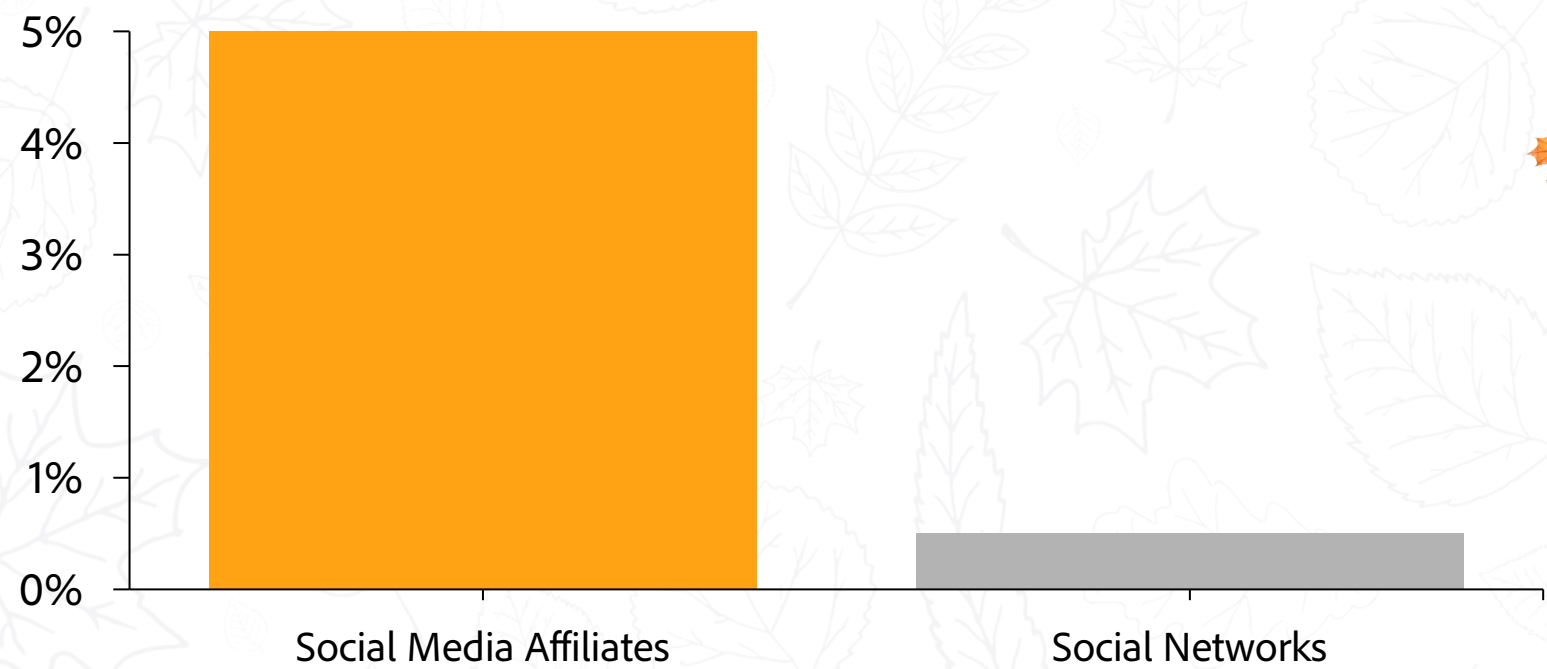
Adobe Digital Insights; January 2024–July 2025



Conversion rate: Social networks vs. social media affiliates

Conversion Rate by Marketing Channel

Adobe Digital Insights; Adobe Digital; January–July 2025

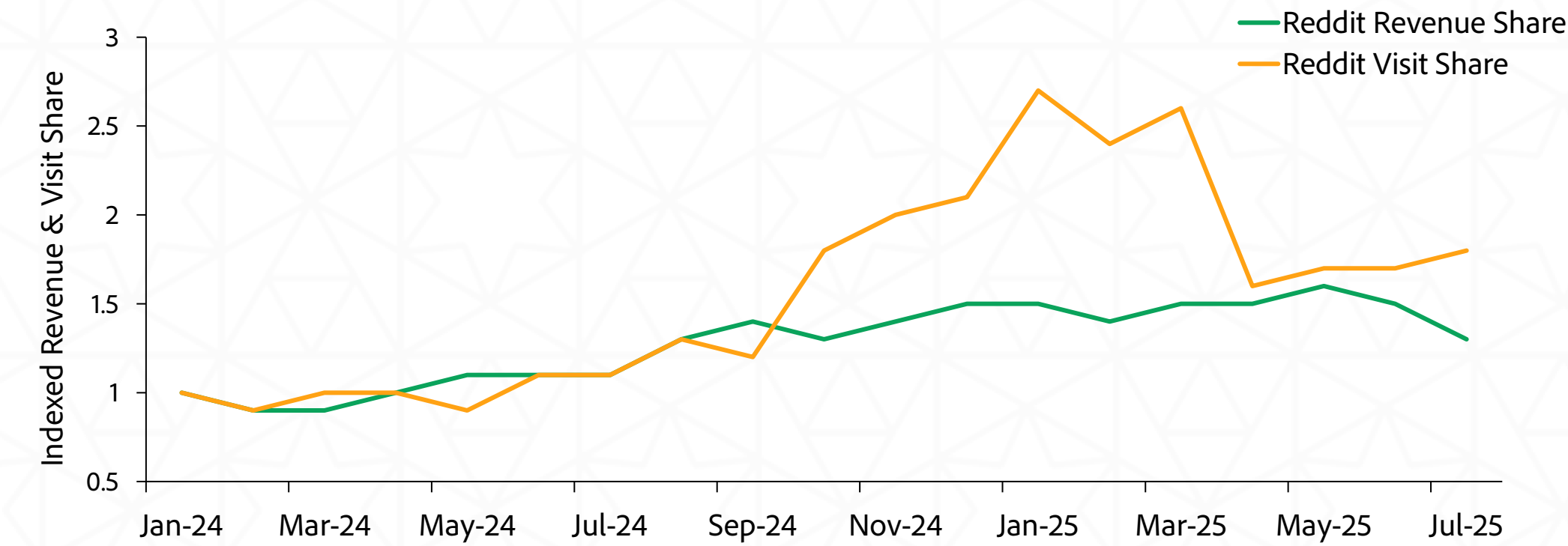


Reddit is the fastest-growing social referral platform



Reddit: Indexed Revenue & Visit Share

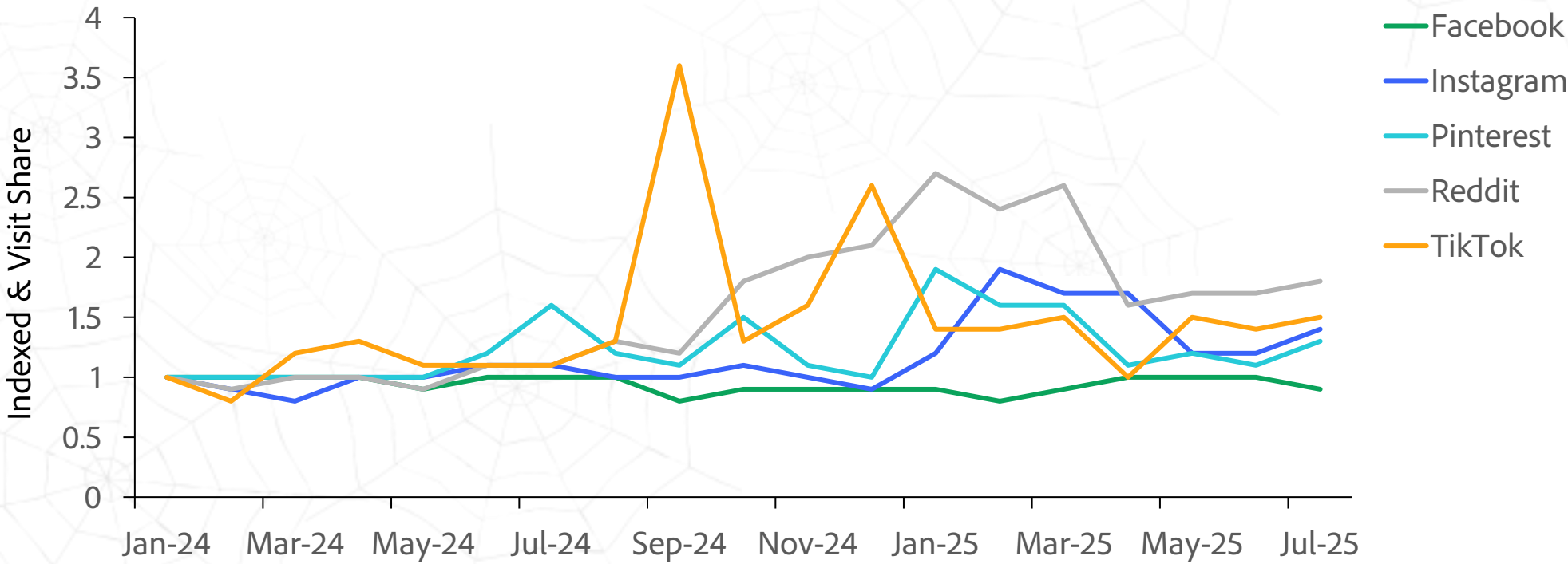
Adobe Digital Insights; January 2024–July 2025



Instagram extends lead over TikTok

Social Media: Indexed Visit Share

Adobe Digital Insights; January 2024–July 2025



Top 5 AI trends transforming holiday shopping



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#1

AI is transforming product and brand discovery



Product discovery with generative AI tools

72% Research

47% Get product recommendations

43% Find deals

35% Ideate for gifts

33% Generate shopping lists

Source: Adobe Digital Insights Consumer Survey

MAC mascara versus NARS which is better

Recommended Picks



Builds curl & length, layering friendly

MACStack Mascara Duo (buildable volume)

\$41.00

Hogies Online



Volumizing, lightweight, clump-free

NARS Climax Mascara

\$26.00

NARS Cosmetics + others

★ 4.2

ChatGPT chooses products independently. [Learn more >](#)

- **MACStack Mascara Duo (buildable volume)** – Perfect if you're after curly, dramatic lashes with a buildable, layer-friendly formula.
- **NARS Climax Mascara** – Ideal for bold, full-volume lashes with a lightweight feel and clean separation.

Now companies can optimize across two pillars



Generative Engine Optimization (GEO)

Optimize brand content to be discovered, summarized, and recommended by generative AI systems.



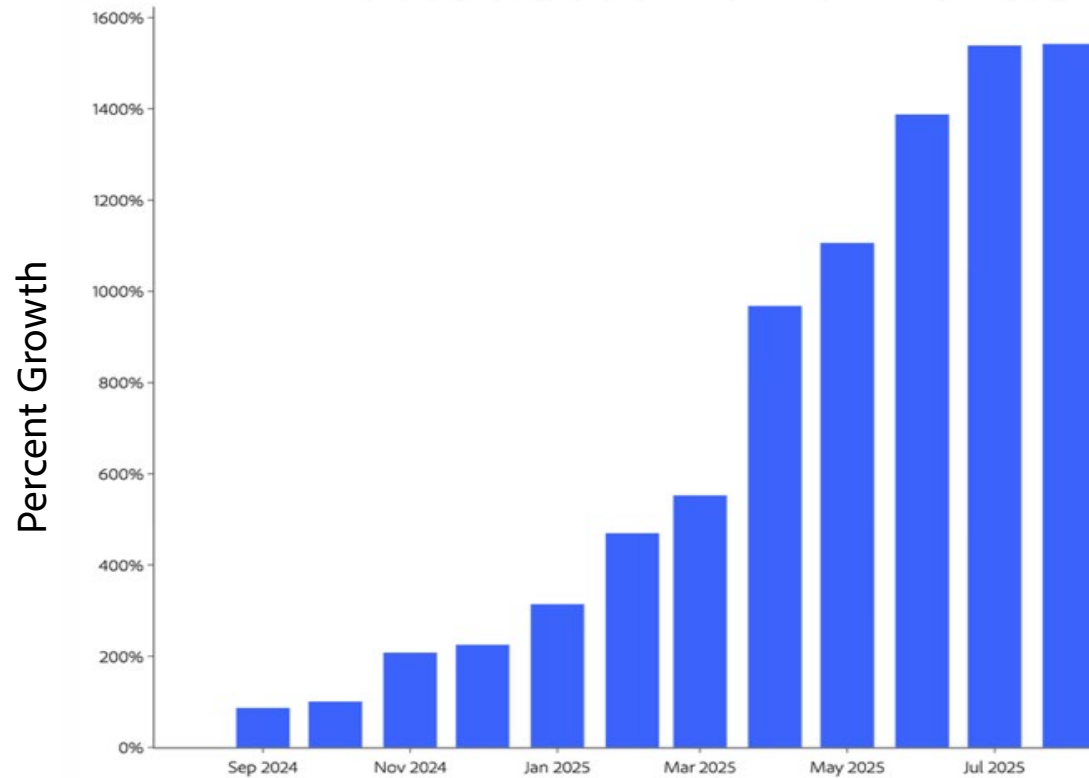
Optimized Shopping Experience

Tailor website experiences to promote exploration, discovery and conversion.

A steep rise in searches using AI platforms

Growth in AI-Driven Visit Share (Retail)

Adobe Digital Insights; August 2024–August 2025



GEO: Optimizing for AI-powered search

	SEO	GEO (AI-powered search)
Primary Goal	Achieve high ranking on search engine results pages (SERPS).	Be recognized as an authoritative, trusted source for AI-driven agents.
Methodology	Keyword optimization, backlinks, metadata, earned and owned content.	Structured, contexted-rich content; cited by reputable sources.
Discover Process	Indexed and ranked by algorithms based on relevance.	Synthesized and curated by AI agents based on multiple data sources.
Transparency	Relatively open, ranking factors often published or inferred.	Opaque; agent logic is proprietary and evolving with emerging tactics around AI-specific metadata.
Key Success Factor	Volume and quality of content tied to keywords.	Reputation, authority, and clarity across trusted sources.

Optimizing for AI systems: Brand citation and comprehension

Near-term



See

Audit how assistants describe you today. Benchmark to improve brand visibility, sentiment and referrals over time.



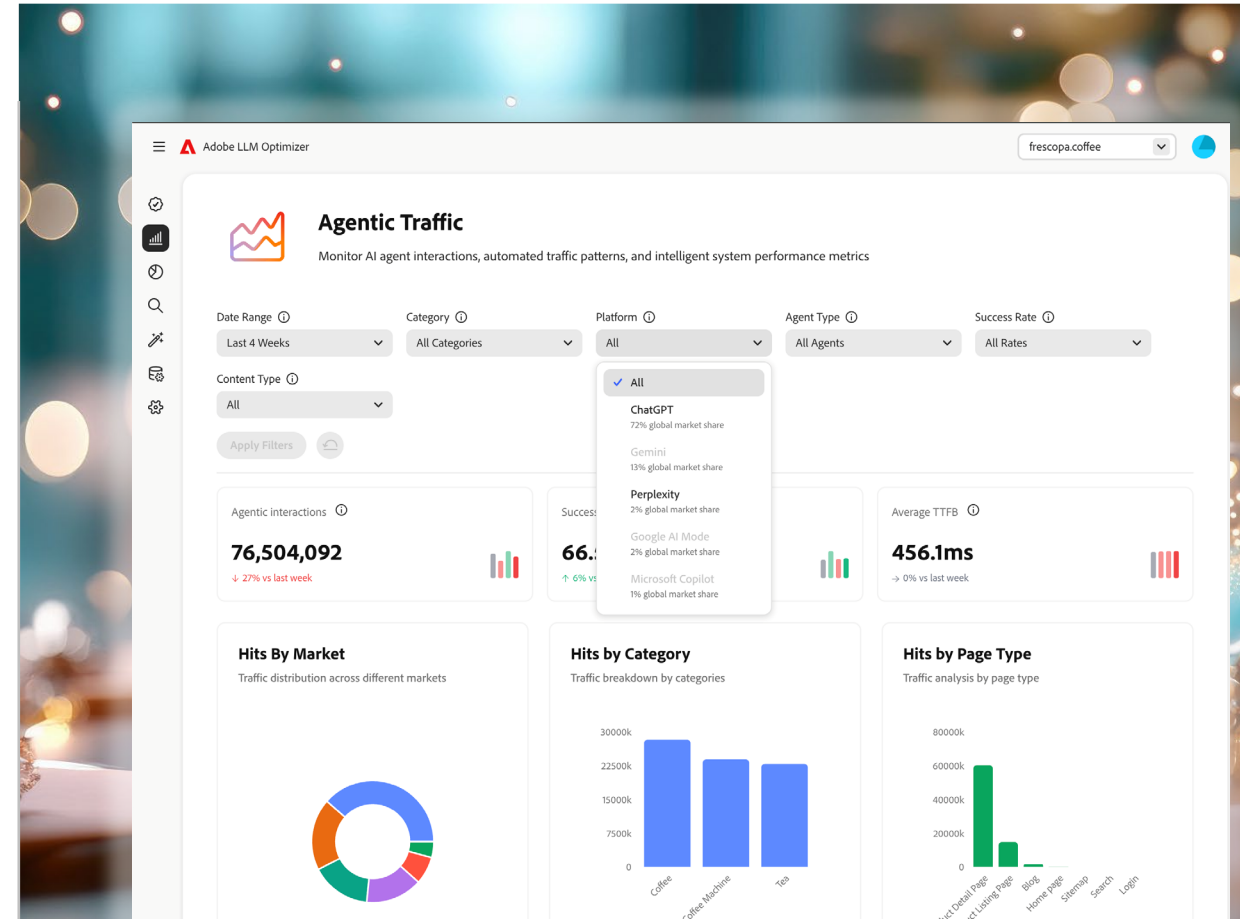
Structure

Make content machine-readable (facts, schema, feeds).



Signal

Strengthen authority across trusted third-party sites.



Optimizing for AI systems: Long-term strategy

Long game



“Wikipedia” your brand, so AI systems can read, reason, and recommend it.



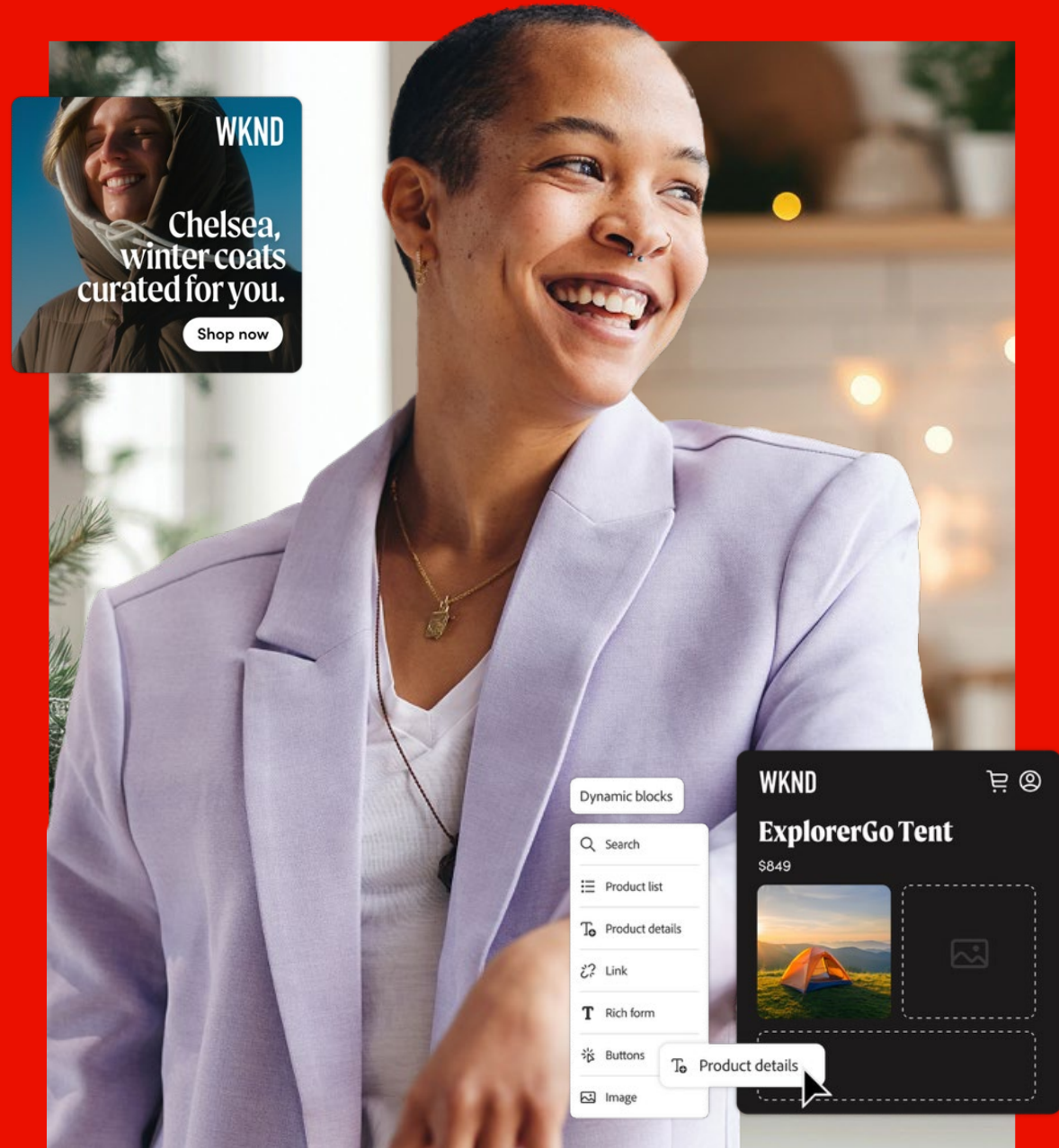
AI agents have expanded your audience.



Re-imagine your content strategy and operations to be dual optimized for people and machines.

#2

AI is transforming the shopping experience



Designing for AI handoff: Turning conversations into conversions



Conversation landing zones:

Craft AI handoff pages that pick up where the conversation left off.

Visitors form impressions of websites in about **0.05 second**



Keep momentum with speed:

If an AI sends a ready-to-buy visitor to a slow page, intent dies.

Each extra second of load time cuts conversions by **4.4%**; **40%** of users abandon after 3 seconds



Guide their next decision:

Design for the second click.
Use clear CTAs, comparison blocks, and “What to do next” prompts.

CTAs above the fold get **304%** more clicks; clear action phrasing can lift conversions **111%+**



Make every AI referral measurable:

Track which assistant, query, or answer drove the visit. Then adapt content strategy and production.

Continuous A/B testing drives **~10–30% annual conversion gains**

Shopping becomes more personal: Own the experience across mobile + conversational

Reported AI Purchase Satisfaction

Adobe Consumer Survey; Aug 2025



■ Satisfied ■ Not Satisfied

72% used AI for online shopping said they are less likely to return items

- AI mobile visit share has consistently risen throughout the year, increasing 44% since the start of 2025.
- Mobile share is expected to continue its growth throughout the rest of the year, reaching approximately 30% during the holiday season.

From LLMs to brand governed delightful conversational experiences



For Brands



Unified Conversational Experience

Consistent engagement across every digital property.



Integrated Knowledge Sources

Connect AEM, web, and product data for accuracy.



Brand Expression & Governance

Control tone, design, and compliance.



Performance Analytics

Measure engagement, conversion, and feedback.



Adobe

For Consumers



Conversational Guidance

Natural, human-like dialogue that understands intent.



Personalized Discovery

Dynamic recommendations as needs evolve.



Visual & Trusted Responses

Brand-approved visuals and citations.



Decision Support

Compare options and explore related content.



Continuous Engagement

Next-step prompts, transitions, and feedback loops.

#3

AI is transforming the customer journey

Loyalty members



Send email:

Email: Skip the line, complete your application online now.



Start conversation:

Chat: Hi, [Name]. I'm here to help guide you through the application process.



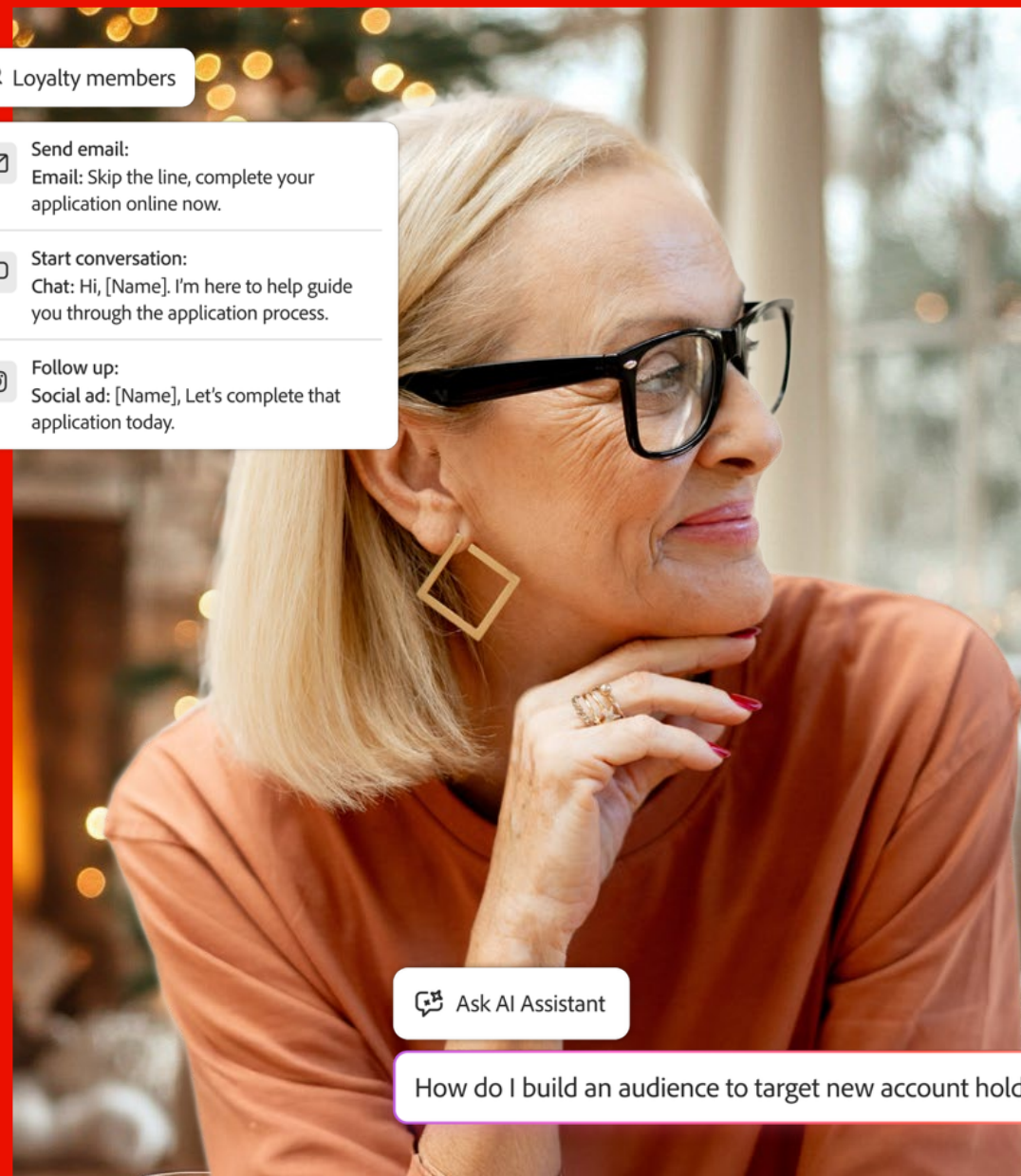
Follow up:

Social ad: [Name], Let's complete that application today.



Ask AI Assistant

How do I build an audience to target new account holders?



Next-generation CX demands real-time capabilities, omnichannel consistency, and seamless personalization

6

average number of meaningful interactions across channels before a purchase

Up to 40%

of consumer perception of brand's value stem from factors other than price

70%

of shoppers prefer to buy from brands that respond in real-time to their behaviors and anticipate needs

68%

of retailers say AI is helping them detect shifting intent faster during key shopping moments

Orchestrating customer experiences during the holidays



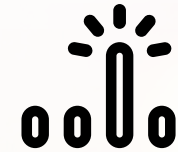
**Detect intent and personalize
to the unknown in real time**

as customers shop for self
and others



**Balance existing, new and
infrequent shoppers**

with self-optimizing journeys
and experiences



**Measure and learn in
moments that matter**

with AI-powered analytics
to optimize in peak days

#4

AI is supercharging creative



Firefly creativity data methodology



AI is giving us a whole new insight into consumers: not just what they want to know or want to buy, but **what they want to create.**

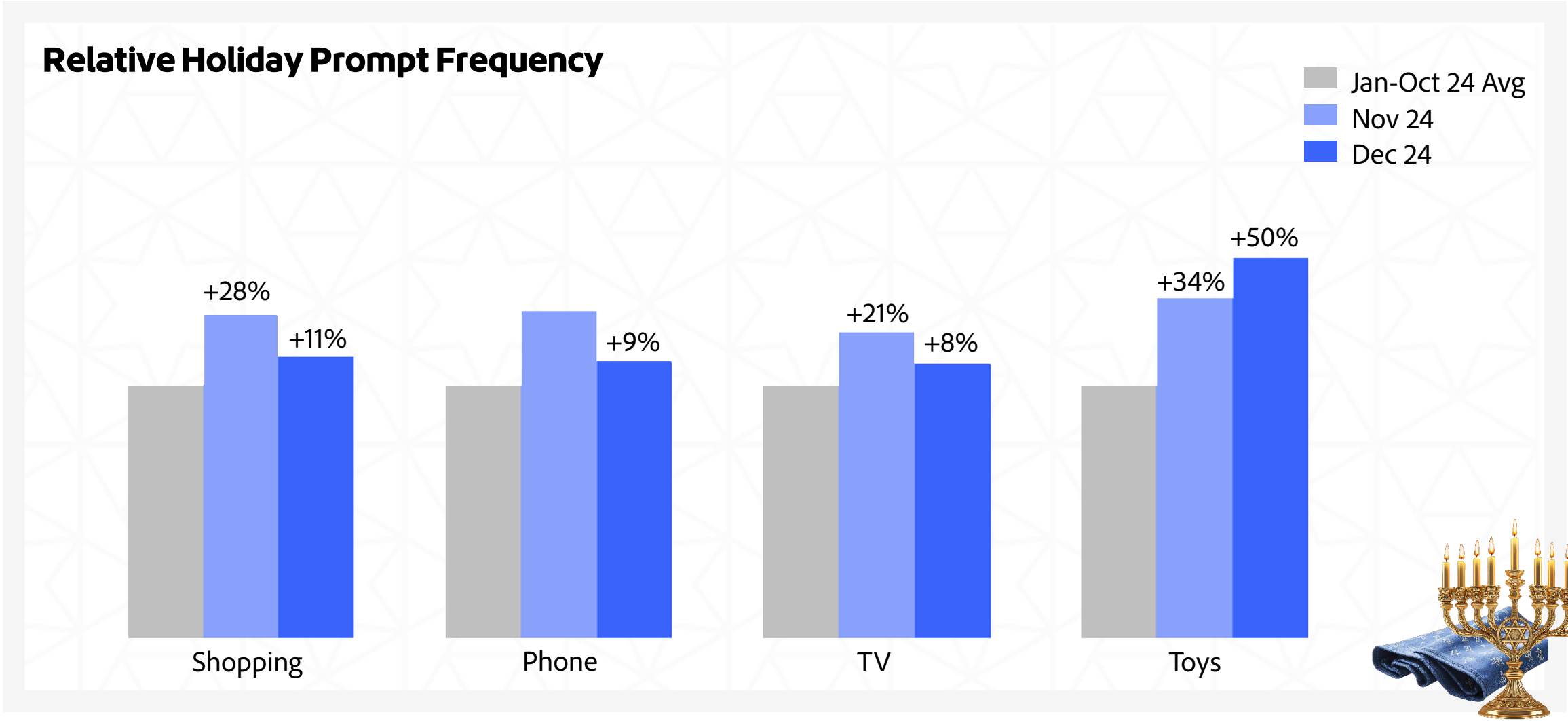


Adobe Digital Insights analyzed millions of Firefly prompts to reveal **emerging creativity trends** — offering an unprecedented look into **creative intent at scale.**



It is a window into the creative mind that can reveal **local, global, demographic and other trends** that we just couldn't see before.

Shopping captures imaginations through the holiday season

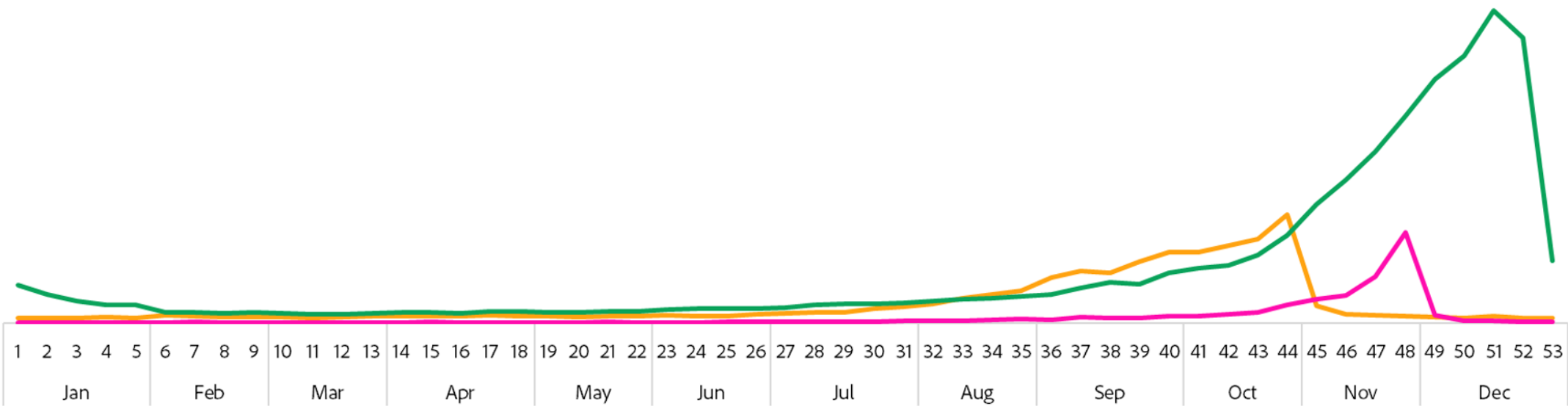


Three holidays dominate creativity toward the end of the year

2024 Holiday Prompt Frequency

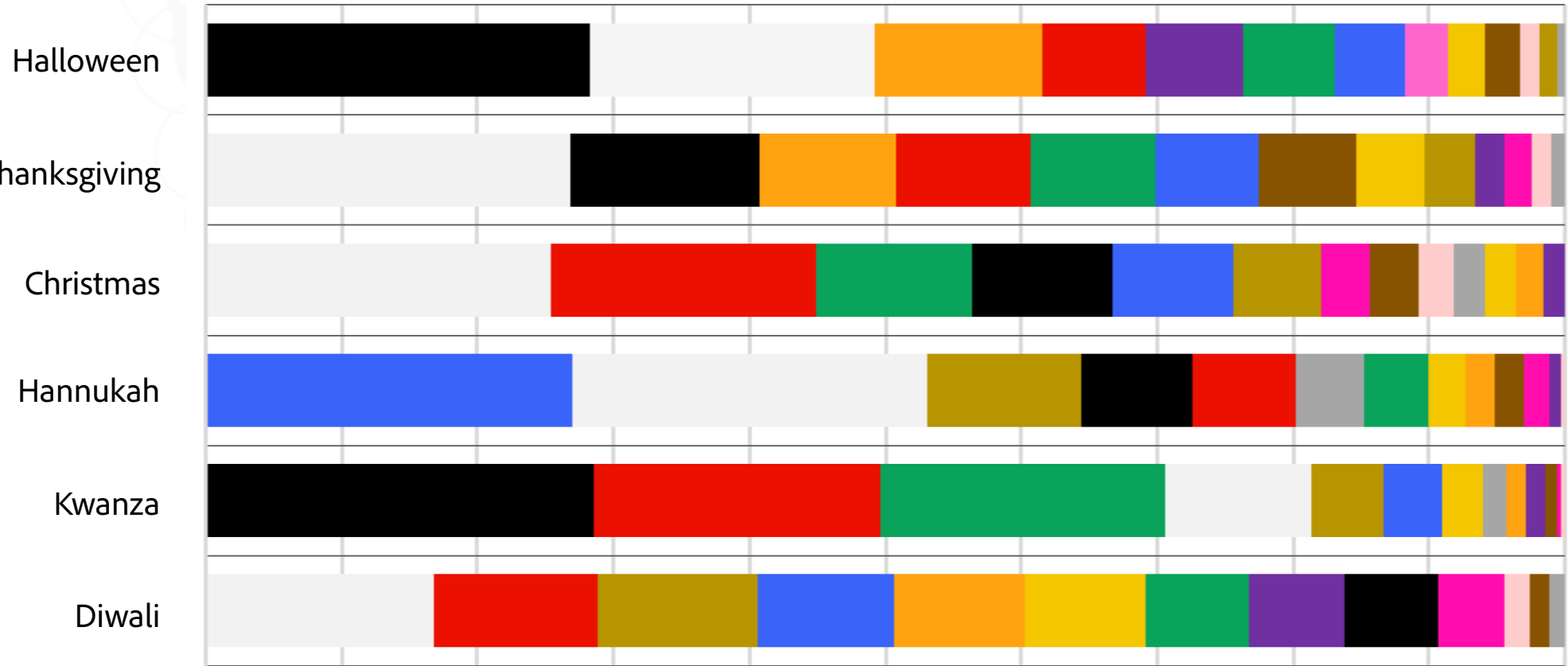


- Halloween 2024
- Thanksgiving 2024
- Christmas 2024



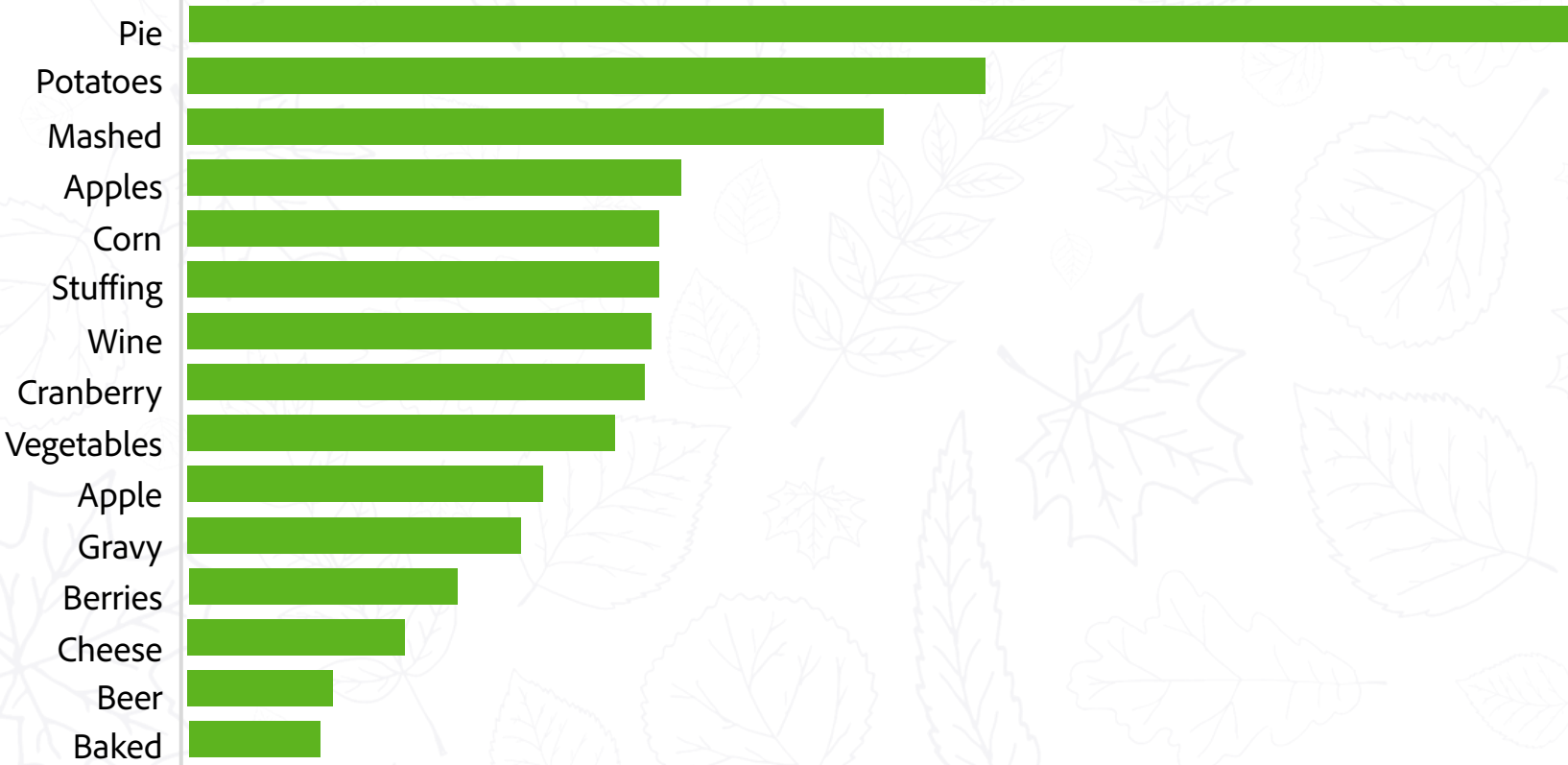
Each holiday has its own distinct color palette

Color Palette by Holiday



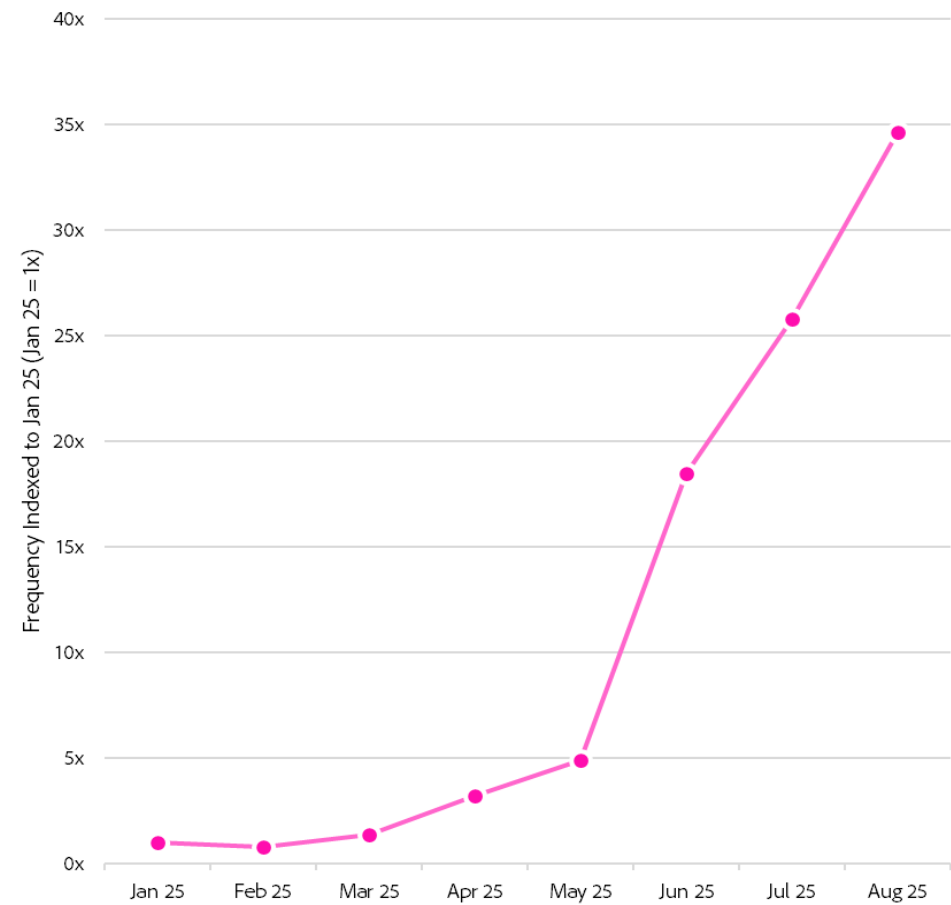
Thanksgiving dinner in creativity: mashed > baked, wine > beer

Most Popular Dishes in Thanksgiving Prompts



The rise of Labubu

Labubu Creativity Frequency
Indexed to January 2025



Generative AI is transforming content economics



-31%

Cost per content piece
(- means reduction in cost)



-37%

Time to market
(+ means reduced time to market)



+49%

Content production throughout
(+ means increase in throughput)



+8%

Conversion
(+ means increase in conversion)



+29%

Quality control costs
(+ means increase in cost)

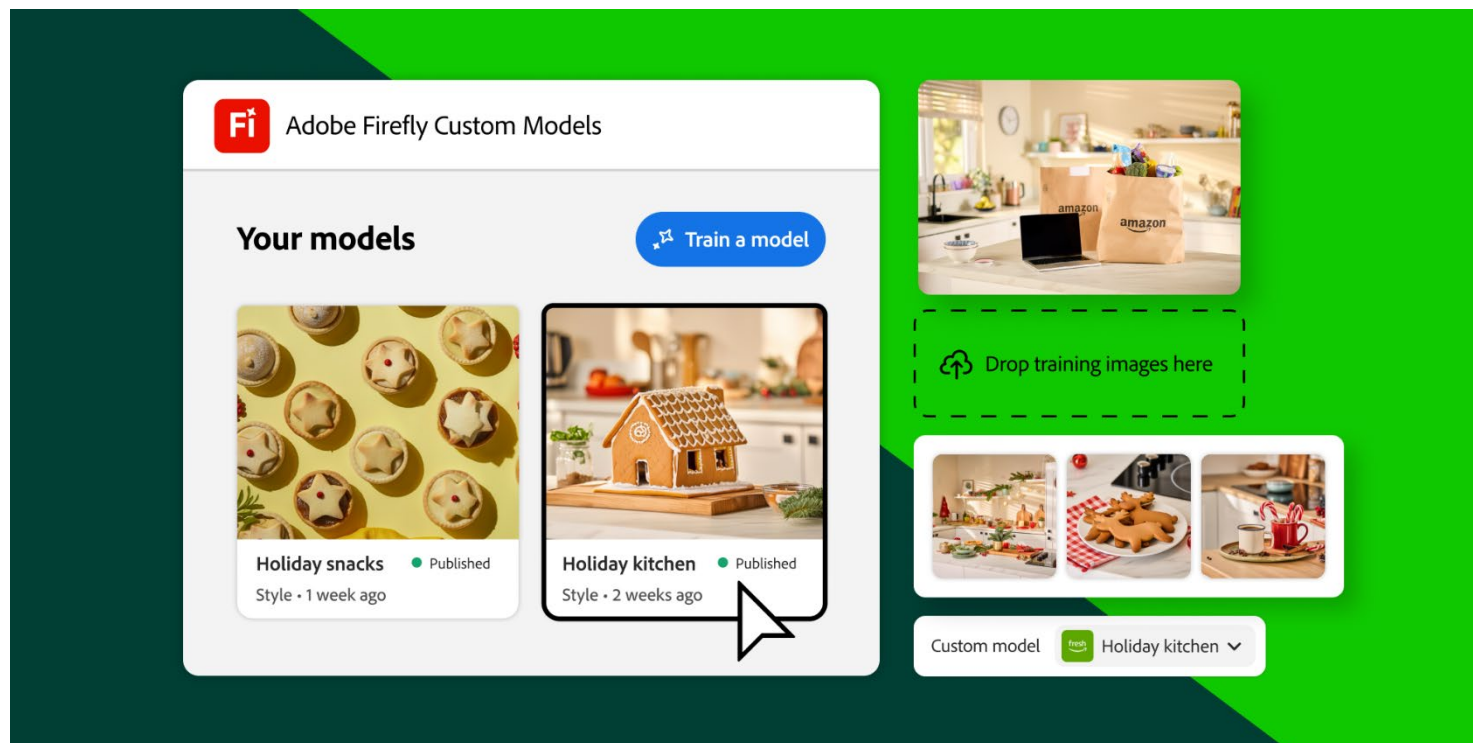


Generative AI dramatically accelerates on-brand content creation and performance, with increased efficiency



Verification and QA is a rising challenge: **on-brand** generative AI and **streamlined workflows** and approvals are key

KINESO helped Amazon Fresh cut production time using Adobe Firefly



Trained Adobe Firefly Custom Models to produce on-brand visuals that plug seamlessly into campaigns, cutting production time by 93% and enabling campaign localization at scale

#5

AI adoption is accelerating, and moving from back office to customer facing

 Generate

Create Instagram ads to promote the WKND puffer jacket

 Key insights

Tags

Assets with **starry skies** had a higher **CTR of 1.034%** than sunset skies which only had a 0.2% CTR.

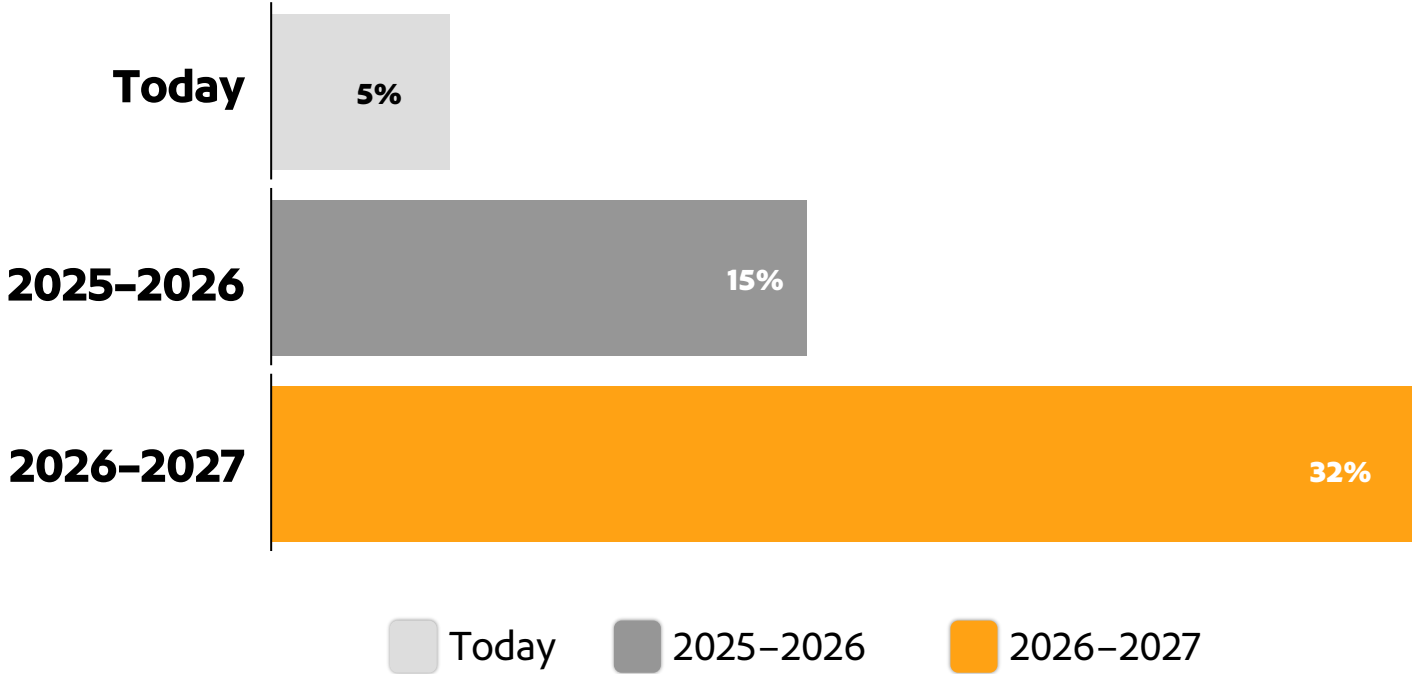
Photography style

Cool tones had a higher **CTR of 2.407%** than warm tones which only saw a 1.323% CTR.



Agentic AI adoption is poised for strong growth

Agentic Adoption



68%

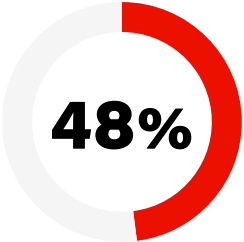
of retailers report having no formal AI governance measures in place. High performers treat governance as a growth enabler not just a defense mechanism.

Agentic AI expands as firms build readiness to scale

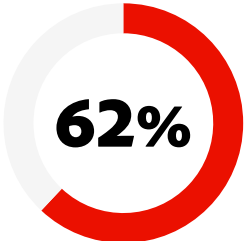
Top Agentic AI Use Cases



AI-powered customer assistance/support



Smart customer segmentation



Automated content tagging and organization



Intelligent content & messaging optimization

Top 3 Challenges

- 1** Finding and retaining talent with the right skills
- 2** Securing budget/investment for transformation
- 3** Measuring ROI/impact of initiatives

Discussion: 2026 and beyond – AI New Year's resolutions



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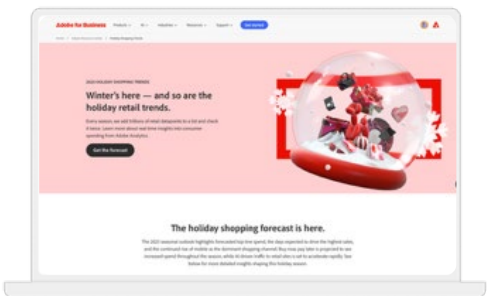
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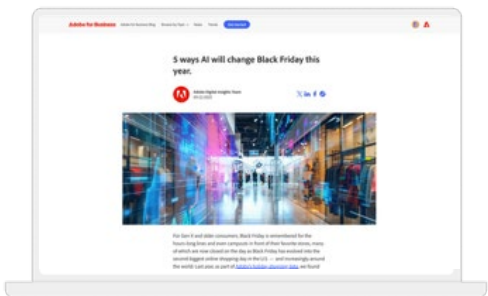
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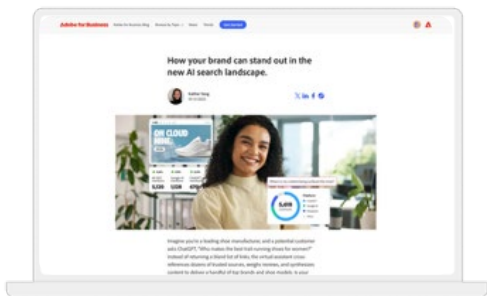
Related resources



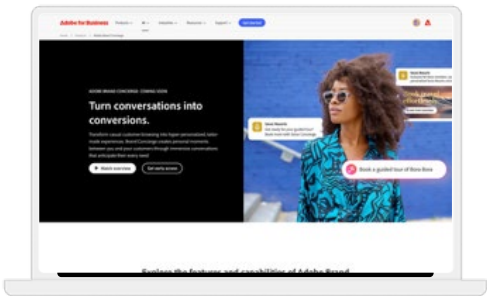
Winter's here — and so are the holiday retail trends.



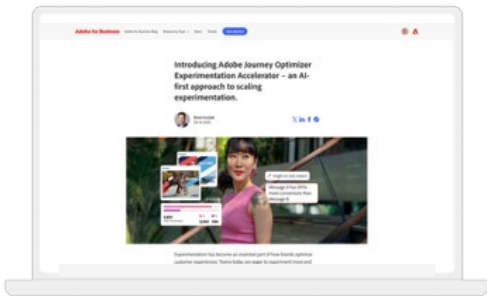
5 ways AI will change Black Friday this year.



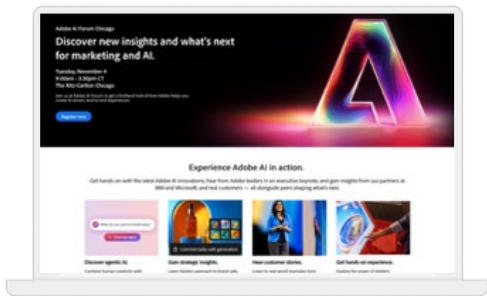
How your brand can stand out in the new AI search landscape.



Coming soon: Adobe Brand Conceirge - Turn conversations into conversions.



Introducing Adobe Journey Optimizer Experimentation Accelerator – an AI-first approach to scaling experimentation.



Upcoming 11/4: Discover new insights and what's next for marketing and AI.

Q&A

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