How To Improve The ROI Of Personalisation At Scale In The Era Of AI

Boost Personalisation Initiatives With More Relevant And Valuable Customer Moments

A FORRESTER CONSULTING THOUGHT LEADERSHIP PAPER COMMISSIONED BY ADOBE, MAY 2025

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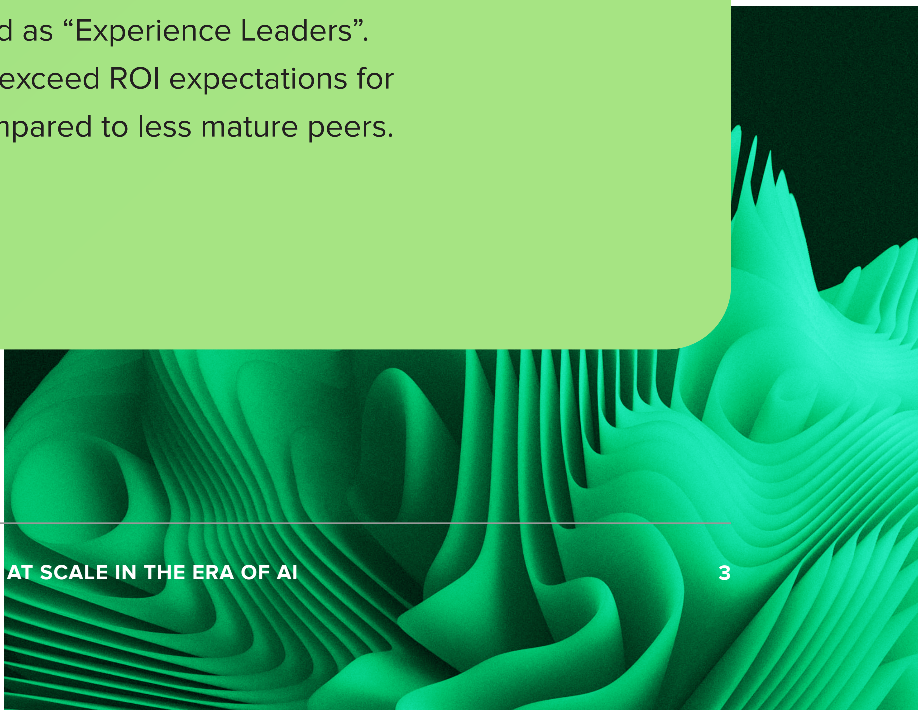
Executive Summary

For many organisations, increased investment and focus on scaling personalisation strategies over the past few years means they have more capabilities and resources than ever before to create personalised moments for their customers. But not every moment is the right moment to personalise an interaction. To exceed customer expectations, organisations need to sharpen their focus on when and where to personalise moments, with customers leading the way.

In January 2025, Adobe commissioned Forrester Consulting to evaluate how buyer sentiment toward personalisation has shifted and how organisation's' strategies have changed since its last commissioned study on personalisation in June 2022, "Personalisation At Scale: Bring Forth The Customer Benefits Of Experience Excellence." Forrester refreshed this global study by conducting two online surveys: the first with 1,181 buyers (589 consumers and 592 B2B buyers) and the second with 647 personalisation decision-makers.

We found that buyers want to experience personalised moments that deliver relevance and value, not those designed to help stimulate sales for the organisation they are interacting with. To understand how these buyer expectations are being met, we evaluated decision-makers on their organisation's ability to practise "personalisation at scale" — bringing together content, data and decision-making for each customer experience. Respondents at the most advanced organisations — those that have mastered the ability to deliver the right personalised experiences at the right moments — were identified as "Experience Leaders". They were significantly more likely to exceed ROI expectations for their personalisation programmes compared to less mature peers.



Key Findings

Personalisation strategies aren't consistently delivering on buyer expectations. Nearly three-quarters of buyers expected organisations to understand when, where and how they want personalised interactions. Yet, just half of decision-makers said fully understanding customer context was important for their organisation's personalisation efforts.

Personalisation at scale requires better, not just more, personalised experiences. Organisations have improved their personalisation capabilities since our 2022 study and most now practise some version of personalisation at scale. Despite these advances, buyers reported no changes in organisations' abilities to personalise interactions.

Experience Leaders use personalisation capabilities to create relevant and valuable customer moments. They use data to understand what to create, then develop content and leverage advanced decision-making to let customers drive their own personalised journeys. Experience Leaders are also at the forefront of using AI to help supercharge their capabilities for delivering the moments customers want.

Experience Leaders see improved ROI from personalisation initiatives. Compared to their less mature peers, these leaders could justify long-term costs; assess personalisation programme ROI; and were more likely to exceed cumulative lift expectations for cost savings, revenue, customer lifetime value and conversion rates. Most experienced three-year cumulative lifts of 20% or more.

Personalisation Strategies Aren't Consistently Delivering On Buyer Expectations

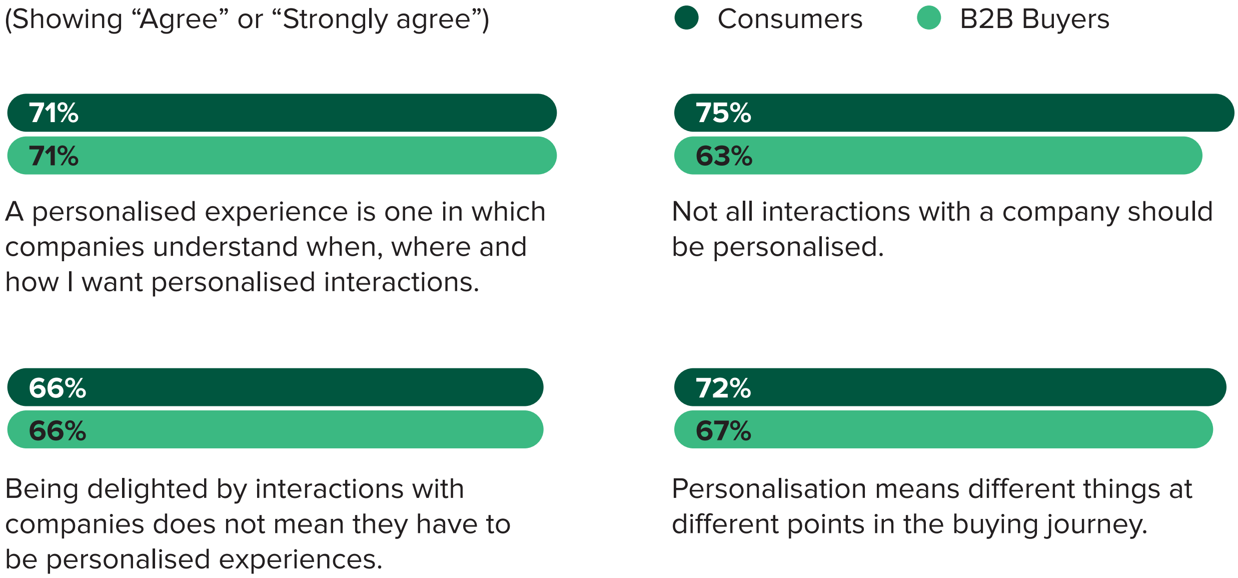
In surveying consumers, B2B buyers, and personalisation strategy decision-makers we found that:

- **Buyers want personalised interactions on their terms — and their expectations are rising.** Nearly three-quarters of consumers and B2B buyers expected the organisations they engage with to understand when, where and how they want to receive personalised interactions. This includes understanding when personalised interactions aren't necessary and what level of personalisation to provide at each stage of their buying journey (see Figure 1). These audiences form their expectations based on real interactions with other organisations that deliver exceptional personalised experiences.

FIGURE 1 **CONSUMERS/B2B BUYERS**

Buyer Sentiment Toward Personalised Interactions

(Showing "Agree" or "Strongly agree")



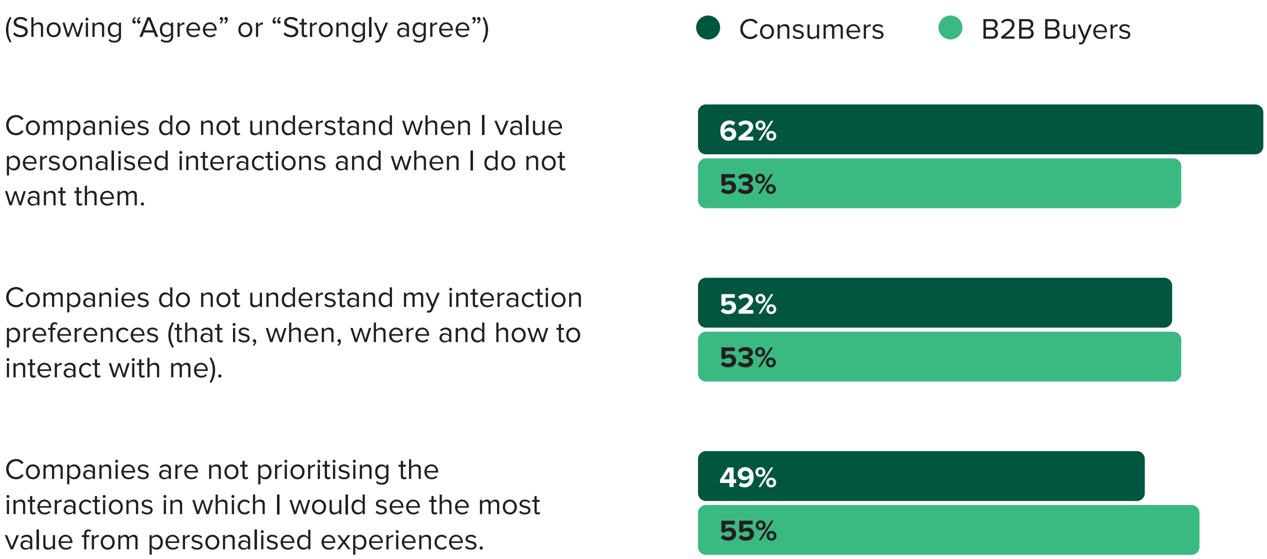
Base: 1,181 respondents; 592 B2B buyers and 589 consumers
Source: Forrester's Q1 2025 B2B Buyer and Consumer Personalisation Survey [E-61927]

- **Most buyers are disatisfied with the personalised interactions they experience.** Buyers seek relevant moments from the organisations they interact with that allow them to realise value across four dimensions: functional (i.e., usefulness), economic (i.e., money), experiential (i.e., interactions and sensations), and symbolic (i.e., meaning).[1] However, our study found that buyers are not convinced organisations understand when they want personalised interactions, how they want to receive them, and which are the most relevant (see Figure 2). Many buyers also described some interactions as invasive, unnecessary, invasive, out of touch and inappropriate.

FIGURE 2 CONSUMERS/B2B BUYERS

Buyer Sentiment Toward What Organisations Are Getting Wrong With Personalisation

(Showing "Agree" or "Strongly agree")



Base: 1,181 respondents; 592 B2B buyers and 589 consumers
Source: Forrester's Q1 2025 B2B Buyer and Consumer Personalisation Survey [E-61927]

- **Many organisations' personalisation goals do not foster customer relevance and value.** Organisations are too focused on personalisation tactics that make the most sense for their business (e.g., how they can best stimulate sales) versus the tactics that would address customer needs and context. Just 51% of decision-makers reported that fully understanding customer context is important or critical for their organisation's personalisation strategies (i.e., understanding what customers to target, what content/services to offer, when/how frequently to trigger personalised content/services, and on which channels to offer/deliver personalised interactions) (see Figure 3).

- **Organisations plan to continue increasing their investment in personalisation.** Eighty percent of decision-makers indicated their organisation plans to continue increasing internal and external investment in its personalisation strategies by 10% or more over the next two years, representing a similar increase versus the last two years (see Figure 4).

FIGURE 3

Elements Of Customer Context Used For Personalisation Strategies

WHO	Understanding who to target for personalised content/services
WHAT	Understanding what content/services to offer to each customer
WHEN	Understanding when/how frequently to trigger personalised content or service delivery to each customer
WHERE	Understanding which channels to use to offer/deliver personalised interactions to each customer

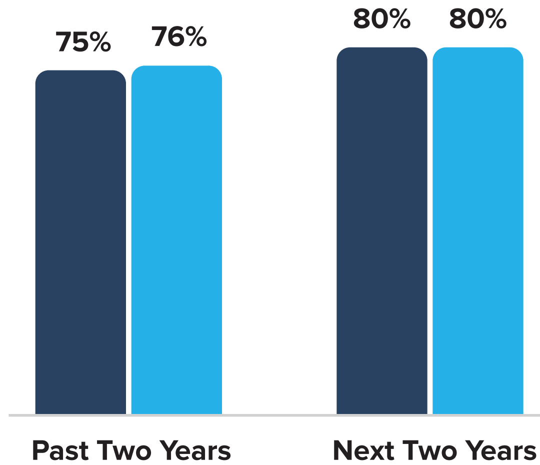
Source: Forrester's Q1 2025 Personalisation Strategy Survey [E-61927]

FIGURE 4 PERSONALISATION STRATEGY DECISION-MAKERS

Personalisation Strategy Investment Increases Of 10% Or More

(Showing "Increase by 10% or more")

- Internal investment in personalisation strategy (e.g., internal resource costs)
- External investment in personalisation strategy (e.g., software vendors, ad agencies)



Base: 647 respondents involved with personalisation strategies at their organisations
Source: Forrester's Q1 2025 Personalisation Strategy Survey [E-61927]

Personalisation At Scale Requires Better, Not Just More, Personalised Experiences

To understand how organisations' personalisation capabilities have advanced over the last three years, we used the same "personalisation at scale" model from the 2022 study. We defined "personalisation at scale" as the ability to bring together content, data and decision-making for each customer experience. Our model assessed respondents' organisations against six different pillars of personalisation capabilities and grouped them into three levels of maturity: Experience Leaders, Evolving Intermediates and Rising Laggards (see Figure 5).

FIGURE 5 **PERSONALISATION STRATEGY DECISION-MAKERS**

Personalisation At Scale Maturity

Respondents were divided into three groups based on their current abilities along six personalisation dimensions:

1. An enterprise-wide programme approach
2. The personalisation tactics used
3. The types of data used
4. Adoption of customer data management/analytics practices
5. Adoption of content creation practices
6. Adoption of omni-channel journey orchestration practices

12% Experience Leader

70% Evolving Intermediate

18% Rising Laggard

Base: 647 respondents involved with personalisation strategies at their organisations; 79 Experience Leaders, 450 Evolving Intermediates, and 118 Rising Laggards
Source: Forrester's Q1 2025 Personalisation Strategy Survey [E-61927]

In 2025, we found that personalisation strategies have matured considerably over the past three years. Personalisation at scale has evolved from an advanced capability executed by only the most mature firms to a table-stakes capability most organisations are practising today. According to our results, there are several factors driving this advance, including:

- **Cross-functional corporate support for personalisation is increasing.** In 2025, 83% of respondents reported their organisations had corporate support for personalisation strategies, compared to just 70% who reported the same in 2022 (see Figure 6).

FIGURE 6 PERSONALISATION STRATEGY DECISION-MAKERS

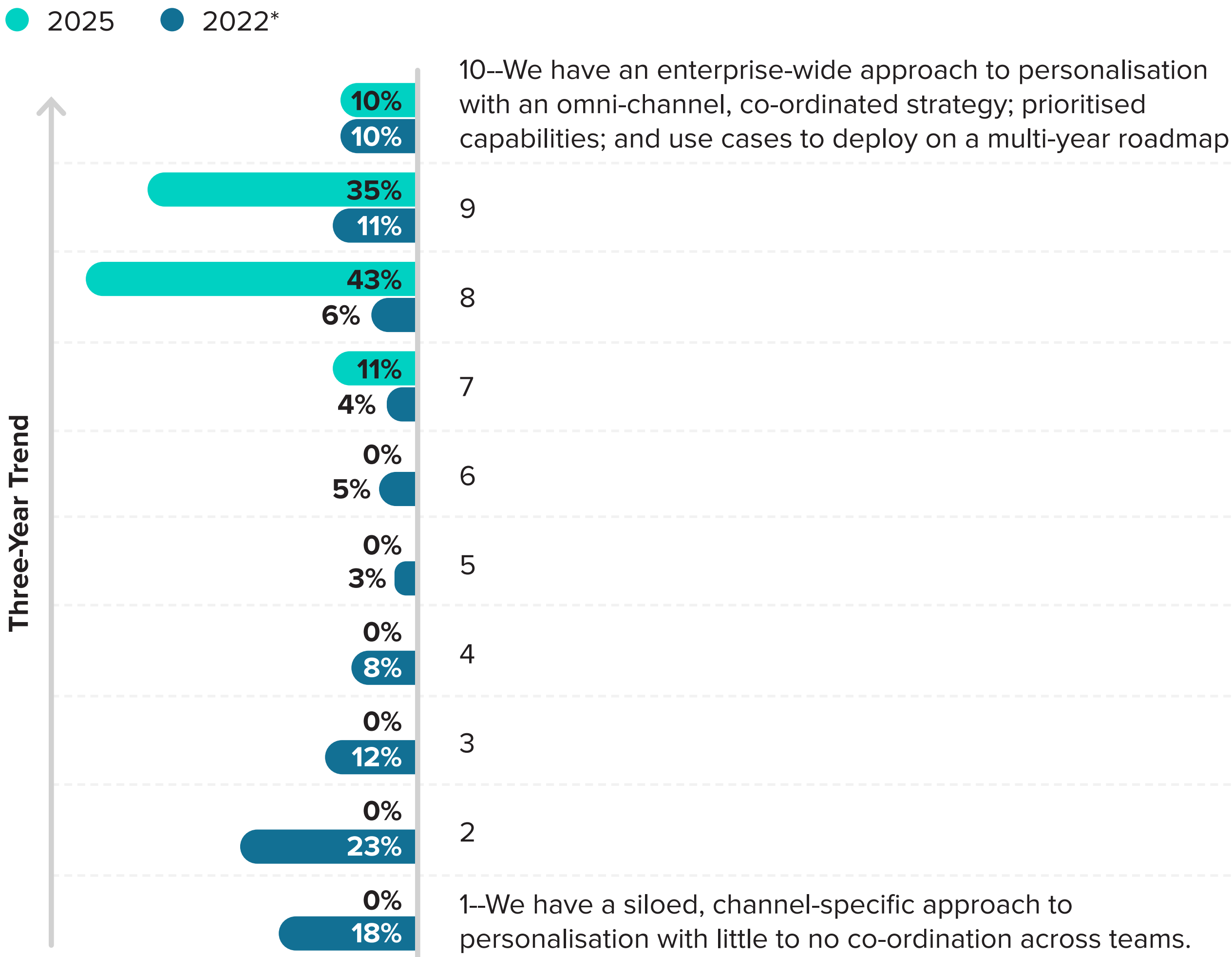
Organisations' Most Senior Sponsor Of Personalisation Programmes

Base: 647 respondents involved with personalisation strategies at their organisations
Source: Forrester's Q1 2025 Personalisation Strategy Survey [E-61927]
*Base: 1,770 respondents involved with personalisation strategies at their organisations
*Source: A commissioned study conducted by Forrester Consulting on behalf of Adobe, June 2022

- **Organisations are twice as likely to have an enterprise-wide approach to personalisation strategies.** On a scale from one (siloed, channel-specific approach) to 10 (enterprise-wide approach), 45% of respondents selected nine or 10 versus just 21% who selected the same in 2022 (see Figure 7).

FIGURE 7 PERSONALISATION STRATEGY DECISION-MAKERS

Organisations' Approach To Personalisation Strategies

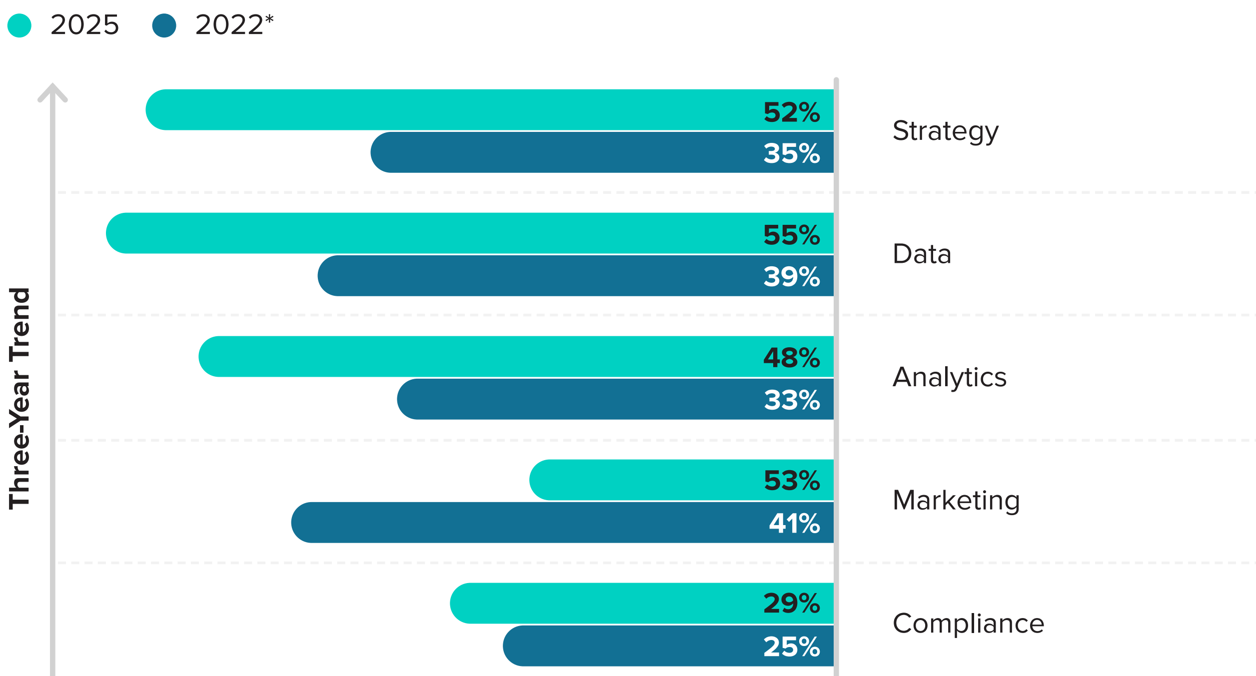


Base: 647 respondents involved with personalisation strategies at their organisations
Source: Forrester's Q1 2025 Personalisation Strategy Survey [E-61927]
*Base: 1,770 respondents involved with personalisation strategies at their organisations
*Source: A commissioned study conducted by Forrester Consulting on behalf of Adobe, June 2022

- **Personalisation is increasingly a strategic initiative.** Eighty-seven percent of respondents reported that their organisations consider personalisation programs a co-ordinated effort with a dedicated centre of excellence versus 79% in 2022. Decision-makers have also strategically optimised their dedicated personalisation skill sets, with significant additions to strategy, data, analytics, marketing and compliance compared with 2022 results (see Figure 8).

FIGURE 8 PERSONALISATION STRATEGY DECISION-MAKERS

Organisations' Dedicated Personalisation Skill Sets



Base: 647 respondents involved with personalisation strategies at their organisations
Source: Forrester's Q1 2025 Personalisation Strategy Survey [E-61927]
*Base: 1,770 respondents involved with personalisation strategies at their organisations
*Source: A commissioned study conducted by Forrester Consulting on behalf of Adobe, June 2022

- **Organisations are using more zero-party data for personalisation.** Nearly half (46%) of respondents reported their organisation uses zero-party data (i.e., data that their customers proactively and intentionally share about themselves) to help deliver personalised interactions versus just 38% in 2022. Organisations are turning to zero-party data to mitigate the impact of data deprecation on customer data. Zero-party data is critical for tailoring personalisation strategies to customer needs and expectations.[2]

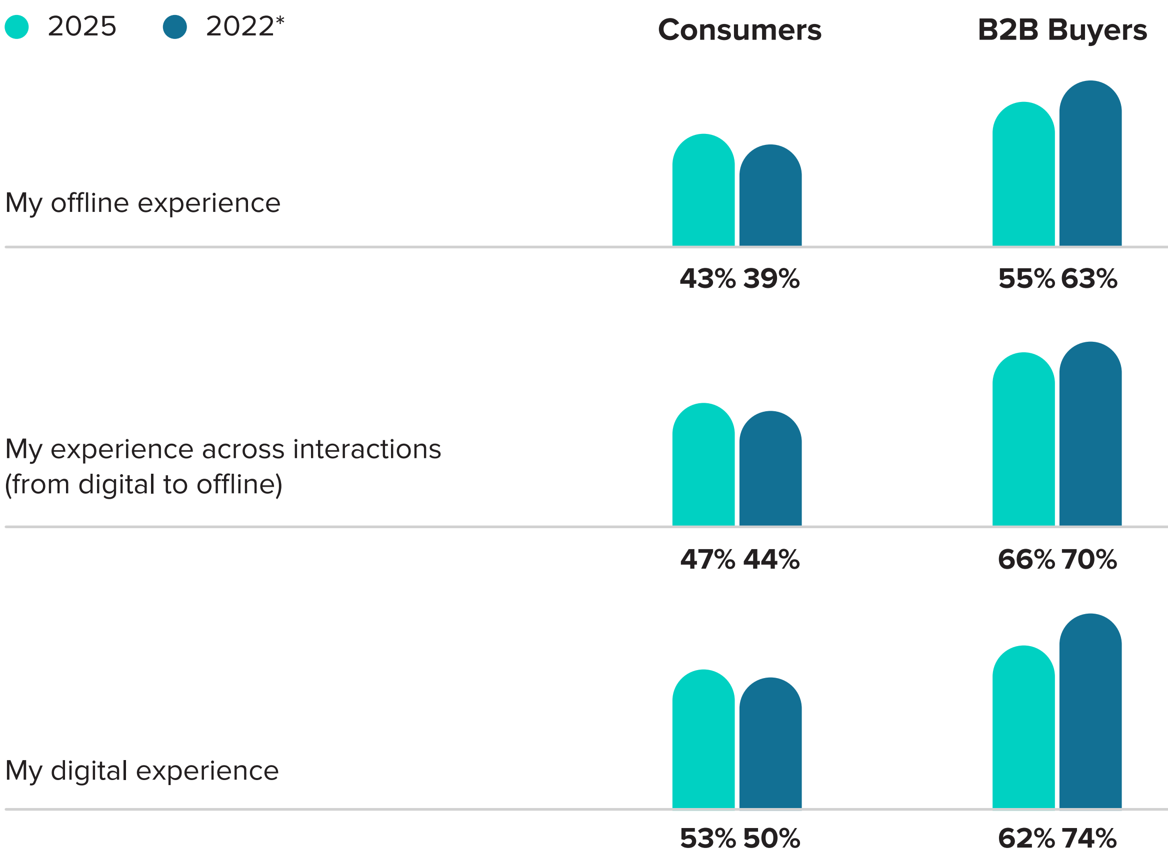
- **Organisations are personalising a greater variety of touchpoints.** Respondents reported that the average number of online and offline personalised touchpoints their organisation uses increased from five in 2022 to seven in 2025.

While most respondents' organisations showed significant advances in personalisation capabilities, they must not become complacent. And, although they can personalise virtually any customer moment, it doesn't mean they should. In fact, despite advancements in personalisation capabilities, buyers did not report seeing a positive change in organisations' ability to personalise their interactions since our 2022 study (see Figure 9). Organisations must prioritise using personalisation at scale to deliver quality over quantity, ensuring greater relevance and value for their customers.

FIGURE 9 **CONSUMERS/B2B BUYERS**

Buyer Perception Of Organisations' Ability To Personalise Their Experiences

(Showing "Very capable" or "Extremely capable")



Base: 1,181 respondents; 592 B2B buyers and 589 consumers
Source: Forrester's Q1 2025 B2B Buyer and Consumer Personalisation Survey [E-61927]
*Base: 1,230 B2B buyers and 1,921 consumers who have recently engaged with a company via a digital channel
*Source: A commissioned study conducted by Forrester Consulting on behalf of Adobe, June 2022

Experience Leaders Use Personalisation At Scale To Serve Customers And Drive Business Benefits

Experience Leaders understand that just because they can potentially personalise any moment, it doesn't mean they should. They successfully employ personalisation at scale investments to deliver tailored moments when, where and how their customers prefer by focusing on three overarching capabilities:

1. Using customer data to identify personalised moments to create for each customer.
2. Creating content to support customers' experience orchestration.
3. Using decision-making to enable customers to drive their own personalised journeys.

EXPERIENCE LEADERS DELIVER BETTER PERFORMANCE FOR THEIR ORGANISATIONS

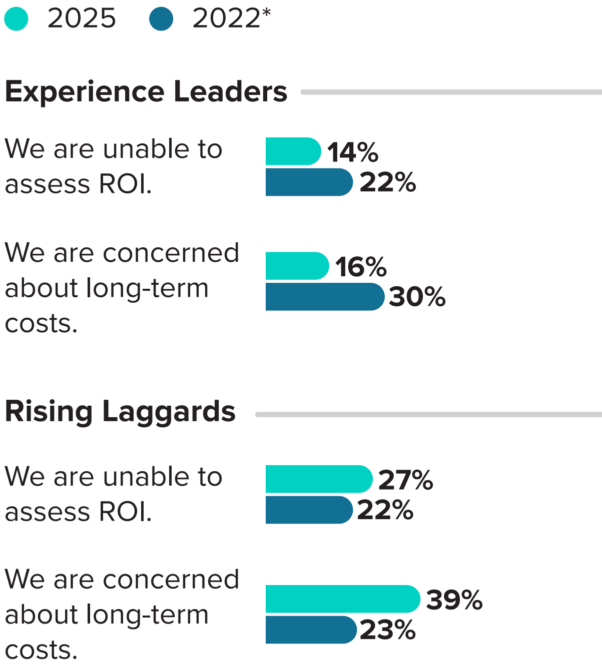
By using personalisation capabilities to deliver the moments their customers want, Experience Leaders achieve significantly higher ROI from these efforts than their less mature peers. We found that Experience Leaders:

- **Can justify the long-term costs and demonstrate ROI of personalisation.** Fewer Experience Leaders faced challenges justifying the long-term costs and assessing personalisation at scale program ROI in 2025 compared to 2022. The opposite was true for Rising Laggards: More struggled to demonstrate ROI and justify long-term costs in 2025 (see Figure 10).

FIGURE 10

PERSONALISATION STRATEGY DECISION-MAKERS

Organisations' Challenges With Implementing/ Expanding Personalisation At Scale



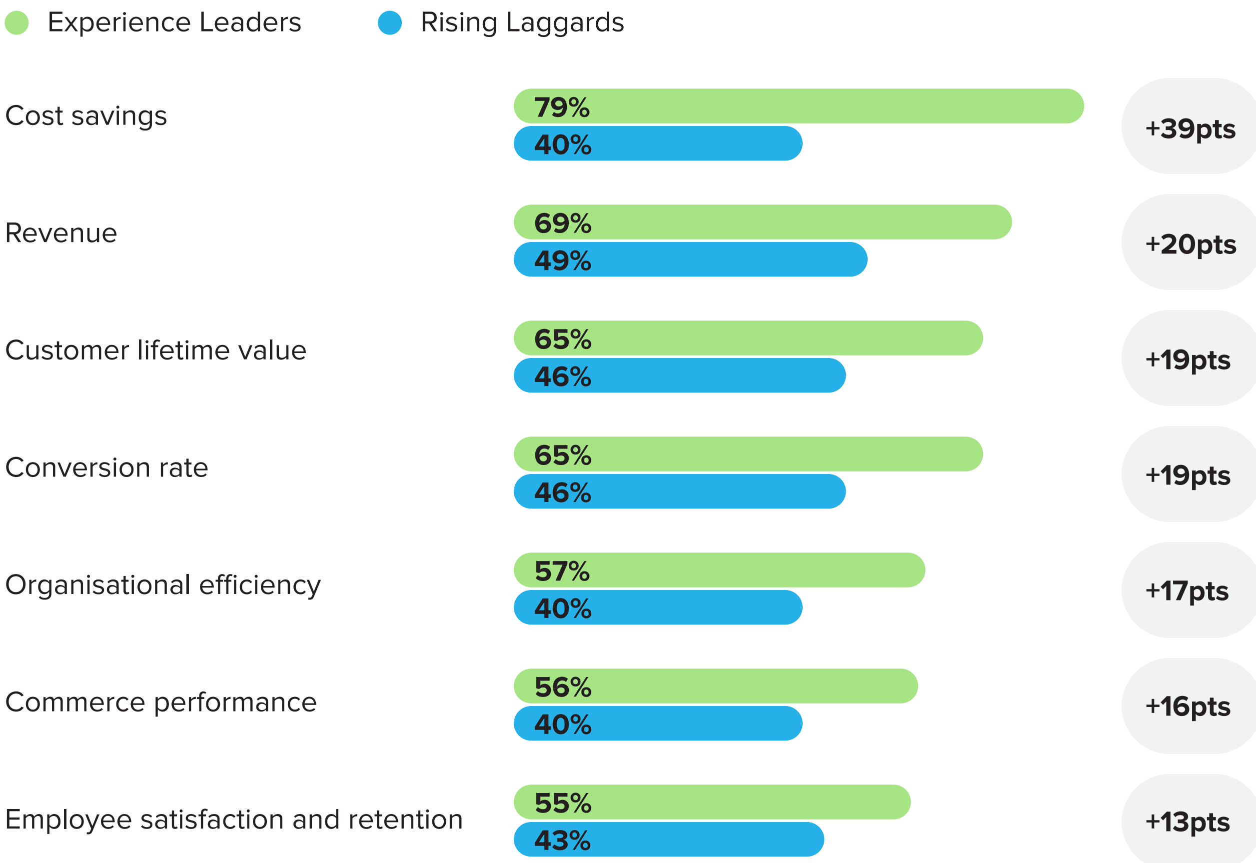
Base: 647 respondents involved with personalisation strategies at their organisations
Source: Forrester's Q1 2025 Personalisation Strategy Survey [E-61927]
*Base: 1,770 respondents involved with personalisation strategies at their organisations
*Source: A commissioned study conducted by Forrester Consulting on behalf of Adobe, June 2022

- **Significantly exceed personalisation performance expectations.** Compared to Rising Laggards, Experience Leaders were twice as likely to exceed cumulative lift expectations in cost savings (+39 percentage points) and were also significantly more likely to beat expectations in revenue (+20 percentage points), customer lifetime value (+19 percentage points), and conversion rates (+19 percentage points) (see Figure 11).

FIGURE 11 PERSONALISATION STRATEGY DECISION-MAKERS

Organisations' Cumulative Lift Performance From Personalisation At Scale Programmes

(Showing "Higher than expectations" or "Significantly higher than expectations")

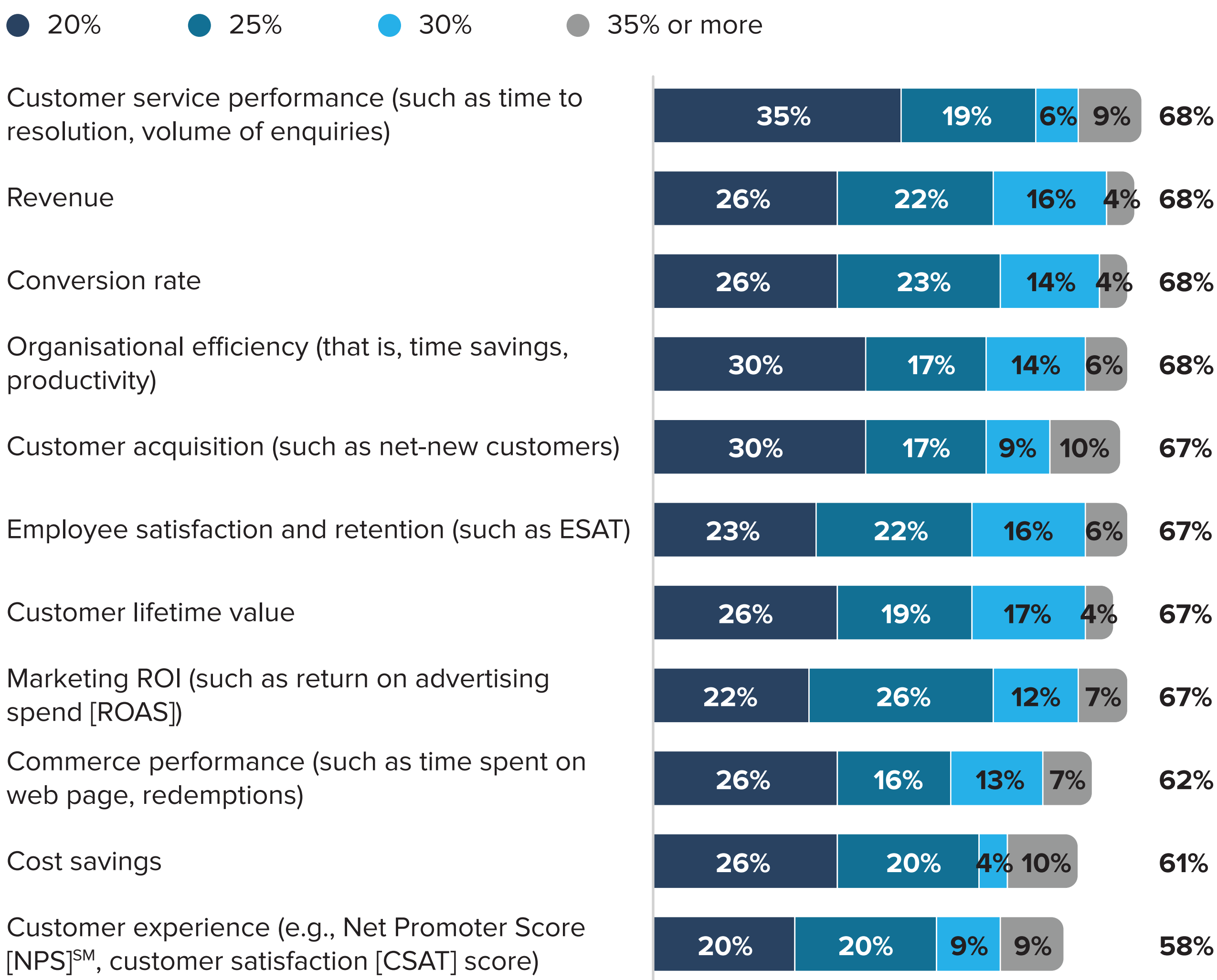


Base: 67-69 Experience Leaders and 87 Rising Laggards at organisations who have implemented personalisation at scale programmes that are experiencing a cumulative lift of 5% or more for each metric shown
Note: Showing metrics with significant differences between Experience Leaders and Rising Laggards
Source: Forrester's Q1 2025 Personalisation Strategy Survey [E-61927]

- **Boost customer and operational KPIs over a three-year period.** The majority of Experience Leaders saw a cumulative lift of 20% or higher across customer and operational metrics. Metrics where the most Experience Leaders reported this lift included customer service performance, revenue, conversion rates, and organisational efficiency (see Figure 12).

FIGURE 12 PERSONALISATION STRATEGY DECISION-MAKERS

Cumulative Lift Achieved By Experience Leaders From Personalisation At Scale Programmes Over The Last Three Years



Base: 69 Experience Leaders at organisations who have implemented personalisation at scale programs
Source: Forrester's Q1 2025 Personalisation Strategy Survey [E-61927]

Experience Leaders Use Data To Identify The Best Personalised Moments For Each Customer

Effectively using data to identify the best personalised moment for each customer not only improves their experience with an organisation but also increases their willingness to share data in return. We found that:

- **Buyers are wary about sharing their data.** Just 8% of consumers and 21% of B2B buyers are always fine with sharing their personal information. Fifty-seven per cent of consumers and 50% of B2B buyers would prefer to remain anonymous across all interactions.

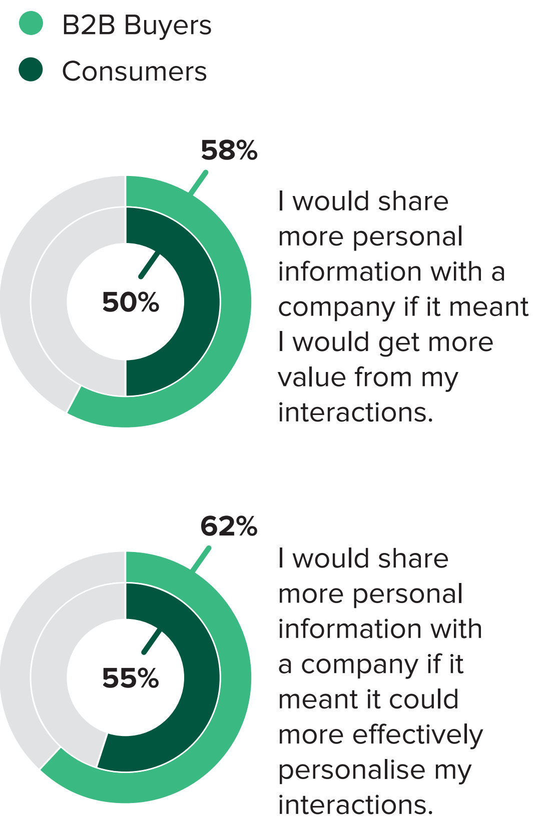
- **Buyers are nearly twice as likely to share data with an organisation if they can experience the personalised interactions they want.** The majority of consumers and B2B buyers indicated they would be more willing to share data if it enabled organisations to personalise their interactions more effectively, or if it meant they would receive more value in return (see Figure 13). To underscore this sentiment, just 23% of consumers and 27% of B2B buyers reported they would be willing to share personal information to get more relevant ads. However, 43% of consumers would share personal information for specific product or service recommendations, and 46% of B2B buyers would share information for value-added experiences such as educational content related to their purchases or goals.

FIGURE 13

CONSUMERS/B2B BUYERS

Buyer Willingness To Share Data

(Showing "Agree" or "Strongly agree")



Base: 1,181 respondents; 592 B2B buyers and 589 consumers
Source: Forrester's Q1 2025 B2B Buyer and Consumer Personalisation Survey [E-61927]

EXPERIENCE LEADERS ARE BETTER AT COLLECTING AND USING CUSTOMER DATA TO INFORM PERSONALISATION TACTICS

Experience Leaders' organisations use their customer data capabilities to deliver personalised moments of relevance and value to their customers. In doing so, they have convinced their customers that sharing more data is advantageous. We found that Experience Leaders:

- **Are better able to cope with data deprecation.** According to Forrester's 2024 Marketing Survey, nearly half (45%) of surveyed B2C marketing decision-makers said it would be difficult to understand the behaviours, attitudes, motivations, and context of their high-priority customers and prospects over the next 12 months.[3] Zero-party data and contextual signals can help combat data deprecation by capturing data on customers and their context to inform personalisation efforts. Experience Leaders were two times more likely to incorporate zero-party data and real-time contextual signal data (e.g., geofenced triggers, in-session website behaviours, dialog inputs) into their personalisation programs.

- **Have more advanced data capabilities for managing personalisation tactics.** Experience Leaders were six times more likely to provide real-time accessibility of omni-channel customer data and four times more likely to create and manage data segments centrally, measure and analyse customer-level interactions/responses, and perform customer data privacy management. They also were three times more likely to categorise and label data effectively to manage and enforce privacy and implement a cross-functional data governance structure (see Figure 14).

FIGURE 14

PERSONALISATION STRATEGY DECISION-MAKERS

Relative To Laggards, Experience Leaders More Frequently Do The Following With Data Capabilities:

6X	Provide real-time accessibility/availability of omni-channel customer data
4X	Create and manage segments centrally, pushing out to activation channels
4X	Measure and analyse customer-level interactions/responses
4X	Perform privacy management
3X	Categorise and label data to effectively manage and enforce privacy
3X	Implement cross-functional data governance

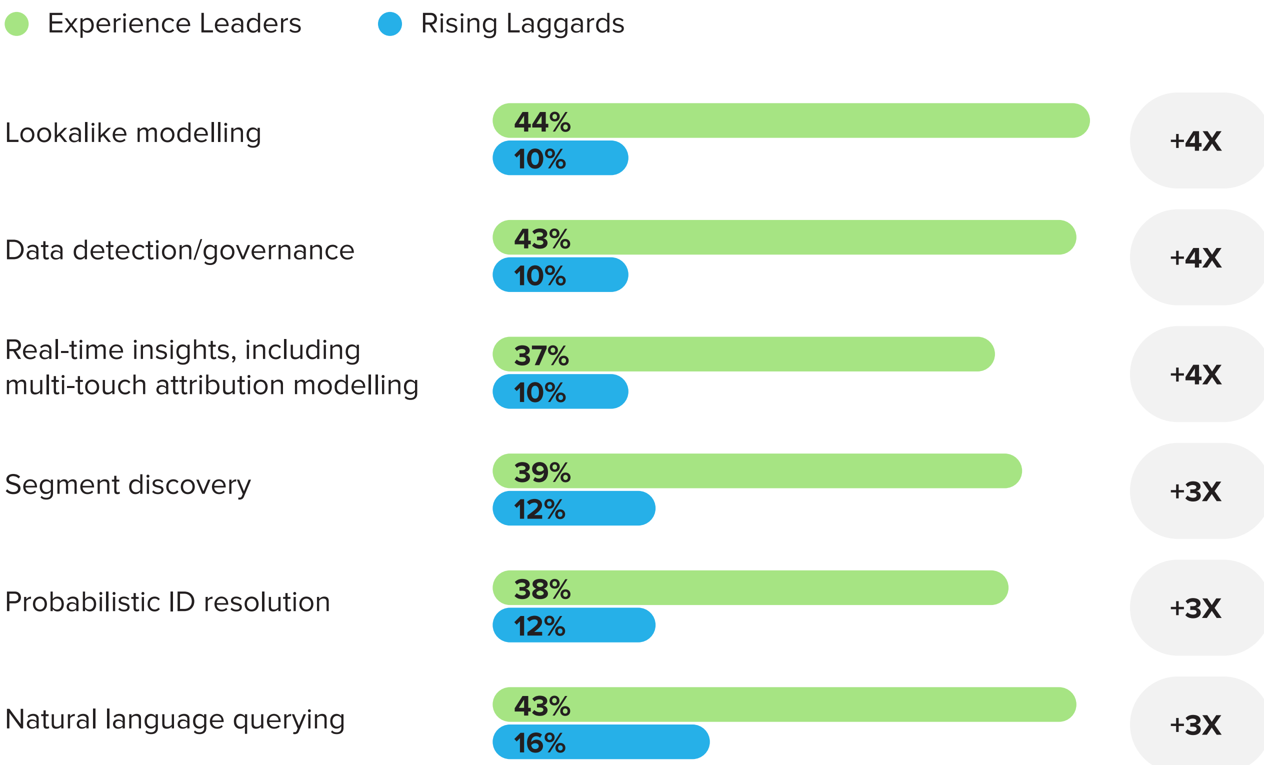
Base: 197 respondents involved with personalisation strategies at their organisations; 79 Experience Leaders and 118 Rising Laggards
Source: Forrester's Q1 2025 Personalisation Strategy Survey
[E-61927]

- **Leverage AI/ML tools to understand who their customers are and what personalised interactions they want.** Experience Leaders were four times more likely to use AI/ML capabilities for lookalike modelling, data detection/governance and real-time insights, including multi-touch attribution modelling. They were also three times more likely to use these capabilities for segment discovery (i.e., identification of new customer groups), natural language querying (i.e., interacting with datasets using everyday language versus query language), and probabilistic ID resolution (i.e., using generative AI (genAI) algorithms to identify customer profiles based on probabilities) (see Figure 15).

FIGURE 15 PERSONALISATION STRATEGY DECISION-MAKERS

AI/ML Data Capabilities Organisations Use Today

(Showing "We currently do this and are expanding our implementation")



Base: 197 respondents involved with personalisation strategies at their organisations; 79 Experience Leaders and 118 Rising Laggards
Note: Showing top responses related to AI/ML data capabilities
Source: Forrester's Q1 2025 Personalisation Strategy Survey [E-61927]

Experience Leaders Use Content Creation To Support Customer Experiences

What good is understanding what personalised moments your customers want if you can't create the content to deliver them? Content creation capabilities are vital because organisations can't create personalised moments without content. To create personalised moments, organisations must understand the consumer or B2B buyer (i.e., "who"), the content (i.e., "what"), the touchpoint (i.e., "where"), and the trigger (i.e., "when").[4] We found that:

- **Buyers want contextually relevant content that addresses their needs.** Consumers and B2B buyers reported that receiving personalised content for support services was among the most compelling they could receive, and personalised online advertisements were the least compelling (see Figure 16).

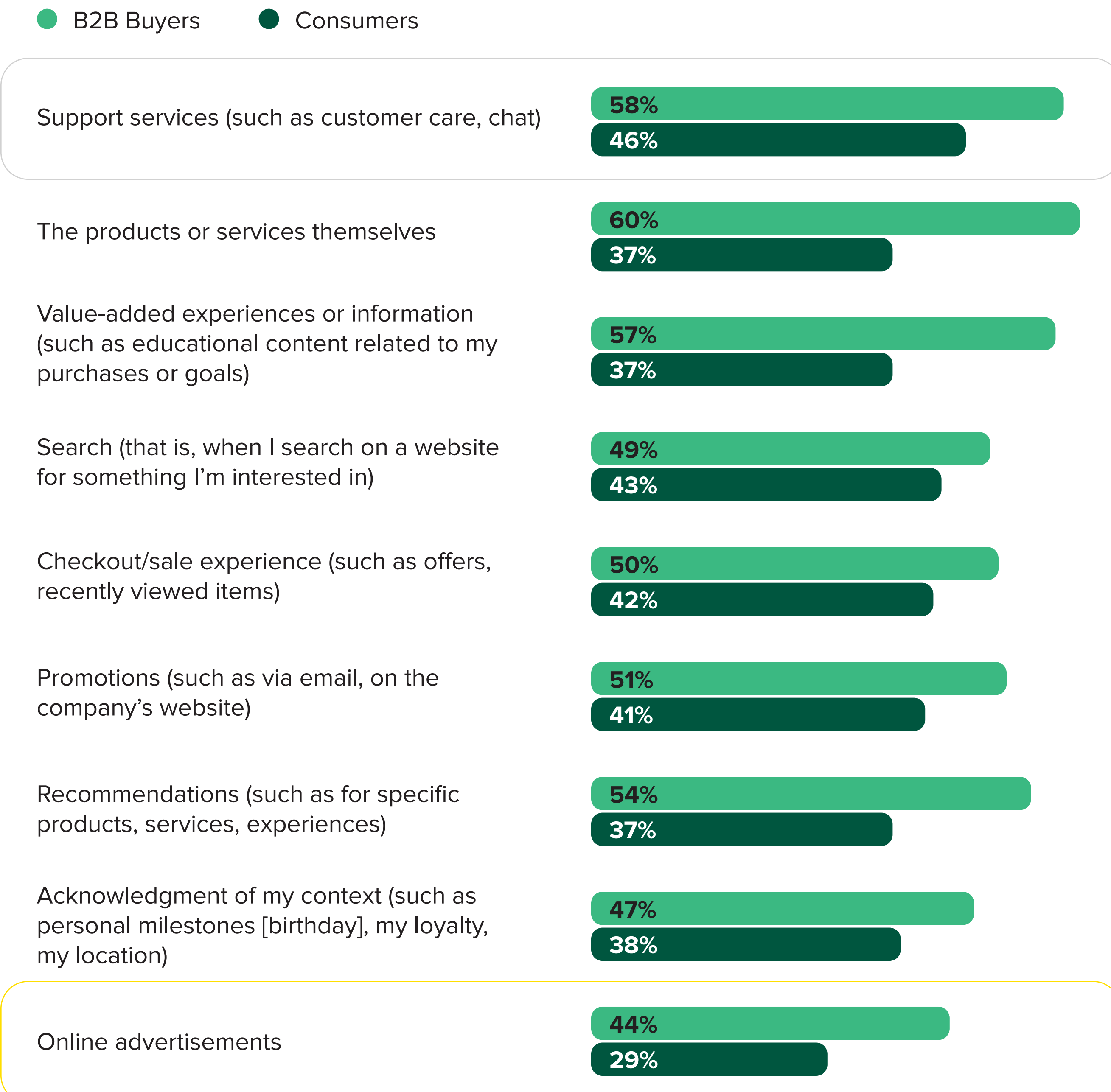
- **Experience Leaders are better able to create and optimise the content buyers care about.** These leaders were eight times more likely to use a unified work management tool for the creative production process and five times more likely to have a single place where creative teams could manage assigned tasks, create content and collaborate in real time. Furthermore, they were four times more likely to use AI/ML to create photorealistic images; tag content with relevant metadata attributes; use a modular content approach; and automate rendering and localisation for different devices, screen sizes, channels and geographies (see Figure 17).

- **Experience Leaders use AI/ML to help deliver more optimised content.** They were eight times more likely to use AI/ML for language and content translation and four times more likely to use these technologies for content analytics, intelligent creation assembly or modular content adoption, and automatic metadata tagging (see Figure 18).

FIGURE 16 CONSUMERS/B2B BUYERS

"How compelling is it to receive personalised content during the following interactions from companies?"

(Showing "Very compelling" or "Extremely compelling")



Base: 1,181 respondents; 592 B2B buyers and 589 consumers
Note: Sorted by total average (consumers and B2B buyers)
Source: Forrester's Q1 2025 B2B Buyer and Consumer Personalisation Survey [E-61927]

FIGURE 17 PERSONALISATION STRATEGY DECISION-MAKERS

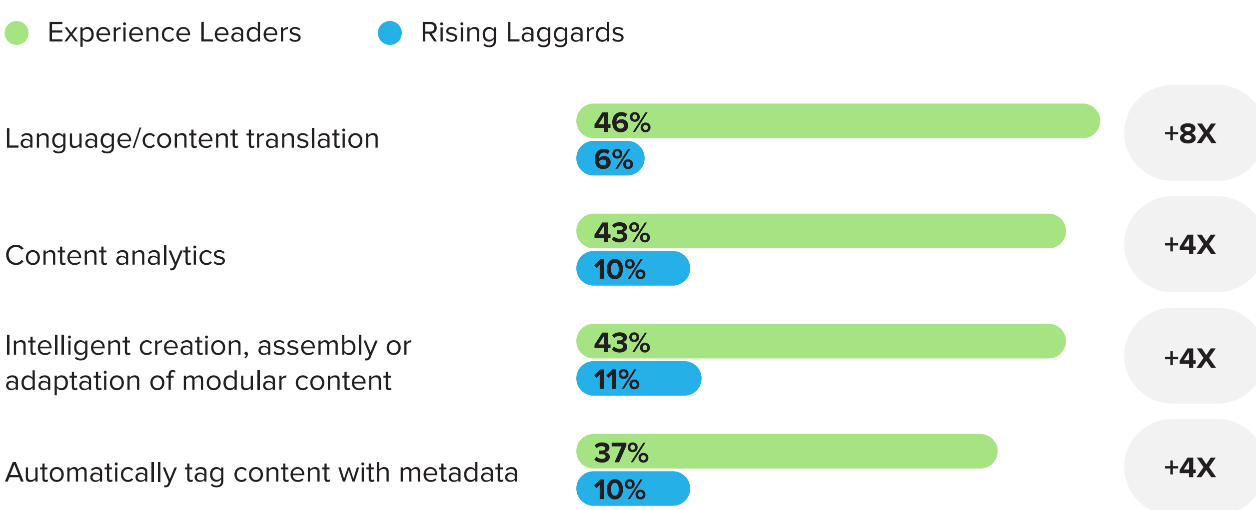
Relative To Rising Laggards, Experience Leaders More Frequently Do The Following With Content Capabilities:

8X	Use a unified work management tool to manage the creative production process
5X	Employ a single place for creative teams to manage assigned tasks, create content, and collaborate in real time and natively within their design tools
5X	Use AI/ML to create photorealistic images, eliminating the need for a photoshoot
4X	Tag content with relevant metadata/ attributes needed for personalisation using a mix of manual and AI automation techniques
4X	Use a modular approach (e.g., content atoms) rather than a single, combined asset for content authors and creatives to build content
4X	Automate rendering and localisation of images for different devices, screen sizes, channels, and geographies

Base: 197 respondents involved with personalisation strategies at their organisations; 79 Experience Leaders and 118 Rising Laggards
Note: Showing top six capabilities by delta between Experience Leaders and Rising Laggards
Source: Forrester's Q1 2025 Personalisation Strategy Survey [E-61927]

FIGURE 18 PERSONALISATION STRATEGY DECISION-MAKERS

AI/ML Content Capabilities That Organisations Use Today



Base: 647 respondents involved with personalisation strategies at their organisations; 79 Experience Leaders and 118 Rising Laggards
Note: Showing top responses related to AI/ML content capabilities
Source: Forrester's Q1 2025 Personalisation Strategy Survey [E-61927]

Experience Leaders Use Decision-making To Let Customers Drive Their Own Journeys

Buyers appreciate relevant and valuable personalised moments delivered when, where and how they want. They do not want personalised moments based on an organisation's assumptions about their buying journey or the journey the organisation wants them to take. Experience Leaders understand this — they prioritise personalisation tactics that drive customer relevance and value versus tactics focused on stimulating sales. We found that:

- **Buyers expect more personalisation later in their buying journeys, yet most organisations don't deliver.** Consumers and B2B buyers were more likely to indicate they expected "mostly" or "fully" personalised content at later buying journey stages, such as when engaging with a company they have already purchased from or repurchasing, upgrading or adding additional products/services (see Figure 19). However, decision-makers reported that their organisations were likely to provide "mostly" or "fully" personalised interactions at early customer journey stages (for example, when fostering awareness/discovery, researching and buying) (see Figure 20).

- **Experience Leaders are better at providing personalised interactions when customers want them.** When comparing the level of personalisation at each buying journey stage among Experience Leaders and Rising Laggards, Experience Leaders showed a significant advantage in providing a higher level of personalisation during later buying journey stages (such as when becoming loyal, repeat customers) when buyers expect the highest level of personalisation (see Figure 21).

FIGURE 19 CONSUMERS/B2B BUYERS

Level Of Personalisation Expected By Buyers At Each Stage Of Their Customer Journey

(Showing “I expect mostly or fully personalised content”)

B2B Buyers   Consumers

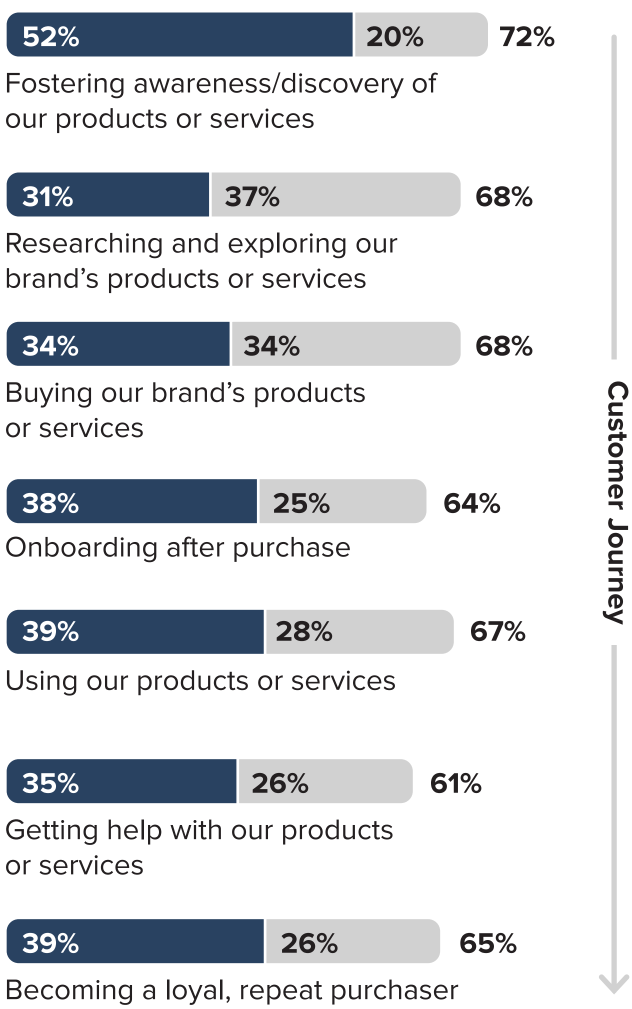
Base: 1,181 respondents; 592 B2B buyers and 589 consumers
Note: Responses in order of customer journey stage
Source: Forrester's Q1 2025 B2B Buyer and Consumer Personalisation Survey [E-61927]

FIGURE 20

PERSONALISATION STRATEGY DECISION-MAKERS

Level Of Personalisation Provided Today By Organisations

- We provide mostly personalised interactions in this phase.
- We provide fully personalised interactions in this phase.



Base: 647 respondents involved with personalisation strategies at their organisations
Note: Responses in order of customer journey stage
Source: Forrester's Q1 2025 Personalisation Strategy Survey [E-61927]

FIGURE 21

Difference In Level Of Personalisation Provided At Each Customer Journey Stage By Experience Leader And Rising Laggard Organisations

(Showing "We provide mostly or fully personalised interactions in this phase")

Customer Journey Stage	Percentage Point Difference Between Experience Leaders And Rising Laggards
Fostering awareness/ discovery of our products or services	23
Researching and exploring our brand's products or services	33
Buying our brand's products or services	22
Onboarding after purchase	23
Using our products or services	26
Getting help with our products or services	22
Becoming a loyal, repeat purchaser	32

Base: 197 respondents involved with personalisation strategies at their organisations; 79 Experience Leaders and 118 Rising Laggards
Note: Responses in order of customer journey stage
Source: Forrester's Q1 2025 Personalisation Strategy Survey [E-61927]

- **Experience Leaders use advanced decision-making capabilities to deliver personalised moments when, where and how their customers want.** Compared to their less mature peers, Experience Leaders were four times more likely to optimise contact channel and frequency by customer and three times more likely to personalise digital and physical experiences in a connected way (see Figure 22).

FIGURE 22 PERSONALISATION STRATEGY DECISION-MAKERS

Relative To Rising Laggards, Experience Leaders More Frequently Do The Following With Personalisation Decisioning Capabilities:

4X Optimise contact channel by customer

4X Optimise contact frequency by customer

3X Personalise digital and physical experiences in a connected way, often using digital to augment the physical experience

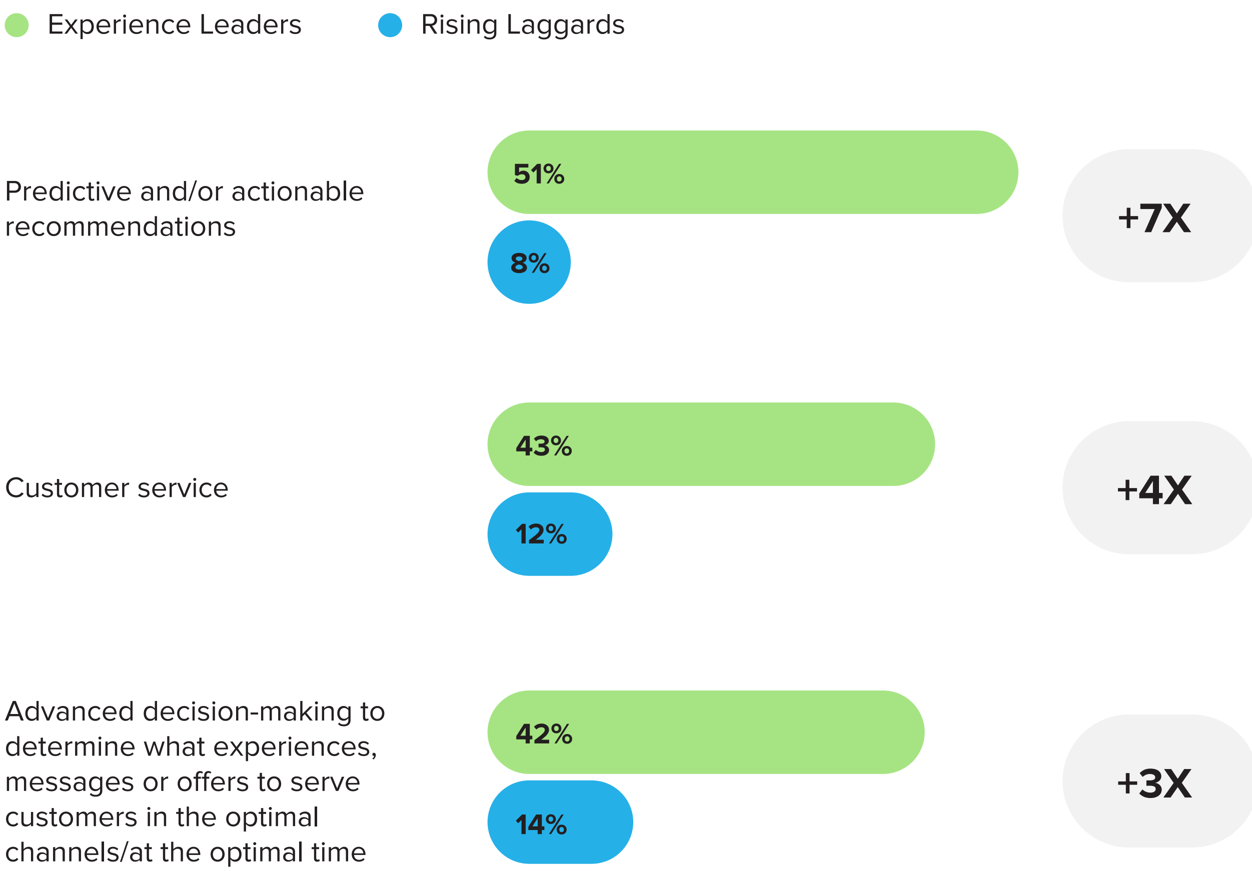
Base: 197 respondents involved with personalisation strategies at their organisations; 79 Experience Leaders and 118 Rising Laggards
Source: Forrester's Q1 2025 Personalisation Strategy Survey [E-61927]

- **Experience Leaders use AI/ML to help deliver the right personalised moments at the right time.** Respondents at these organisations were more likely to use AI/ML technologies: seven times more for predictive/actionable recommendations; four times more for customer service (such as chatbots); and three times more for advanced decisioning to determine and deliver the right experiences, messages or offers in the right channel at the right time (e.g., next best action/offer) (see Figure 23).

FIGURE 23 PERSONALISATION STRATEGY DECISION-MAKERS

AI/ML Personalisation Decisioning Capabilities That Organisations Use Today

(Showing “We currently do this and are expanding our implementation”)



Base: 647 respondents involved with personalisation strategies at their organisations; 79 Experience Leaders, 450 Scaling Intermediates and 118 Laggards
Note: Showing top responses related to AI/ML decisioning capabilities
Source: Forrester's Q1 2025 Personalisation Strategy Survey [E-61927]

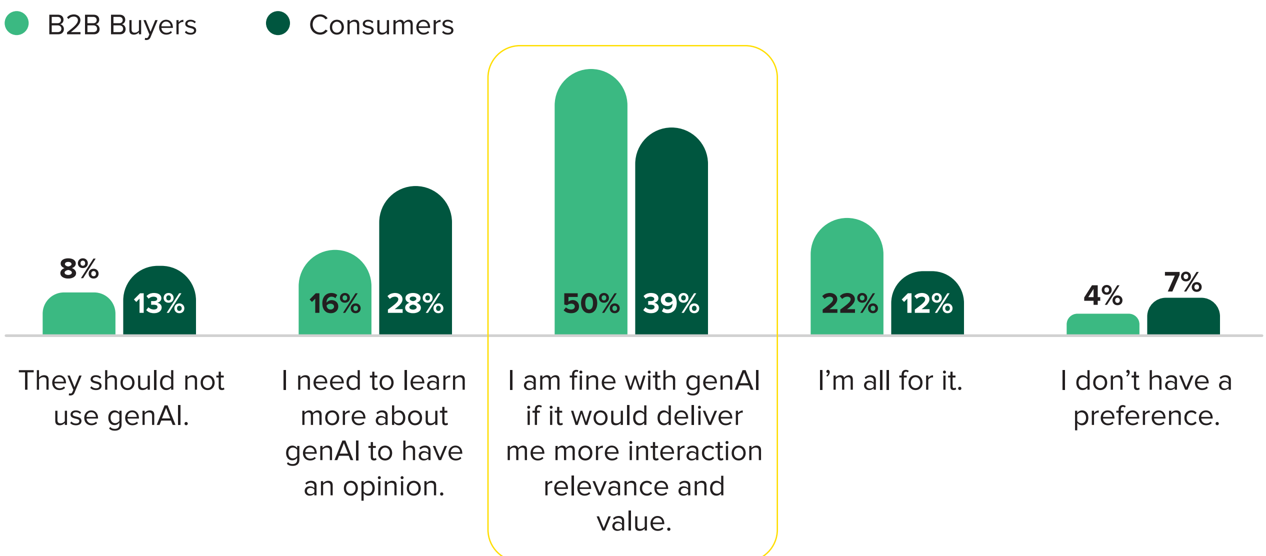
GenAI Has The Potential To Help Organisations Deliver Customers More Relevant And Valuable Personalised Interactions

Overall buyer sentiment toward use of genAI for personalised interactions is similar to their view of any form of personalised interaction — they simply want personalised moments that are relevant and valuable to them.[5] GenAI can help supercharge organisations' personalisation efforts if it's used to help understand, create, and deliver more relevant and valuable moments to customers. We found that:

- **Buyer openness to genAI hinges on its ability to provide added relevance and value.** Many surveyed buyers would be open to genAI use if it improved the relevance and value of the personalised interactions they receive (see Figure 24). The majority of buyers reported believing that genAI will help improve how they interact with organisations in the future and the value they receive from these interactions (see Figure 25).

FIGURE 24 CONSUMERS/B2B BUYERS

Buyer Sentiment Toward GenAI Use For Personalised Interactions

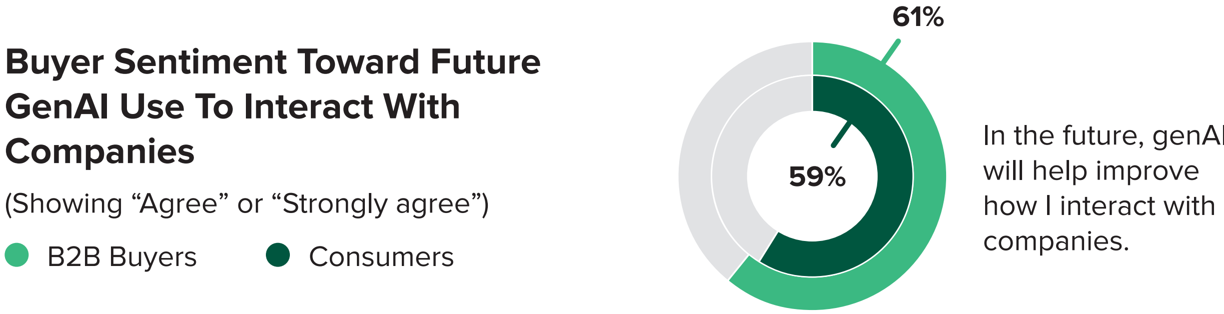


Base: 1,181 respondents; 592 B2B buyers and 589 consumers
Source: Forrester's Q1 2025 B2B Buyer and Consumer Personalisation Survey [E-61927]

FIGURE 25 CONSUMERS/B2B BUYERS

Buyer Sentiment Toward Future GenAI Use To Interact With Companies

(Showing “Agree” or “Strongly agree”)

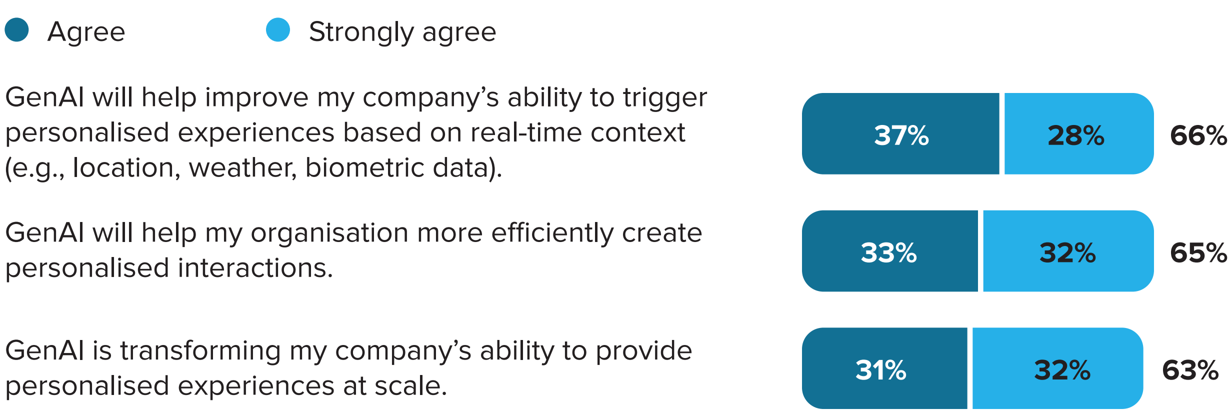


Base: 1,181 respondents; 592 B2B buyers and 589 consumers
Source: Forrester's Q1 2025 B2B Buyer and Consumer Personalisation Survey [E-61927]

- **GenAI has the potential to help organisations create and deliver personalised moments.** Approximately two-thirds of decision-makers reported that genAI helps their organisation provide personalised experiences at scale. Furthermore, a similar percentage reported that genAI will have a positive impact on their organisation’s ability to create personalised interactions more effectively and their ability to trigger personalised experiences for customers based on real-time context (see Figure 26). These potential benefits align with emerging genAI use cases that are currently having the most impact for organisations, which include content creation, natural language interface, and application assistants to navigate software/platforms.[6]

FIGURE 26 PERSONALISATION STRATEGY DECISION-MAKERS

Future Benefits Of GenAI On Organisations’ Personalisation Programmes

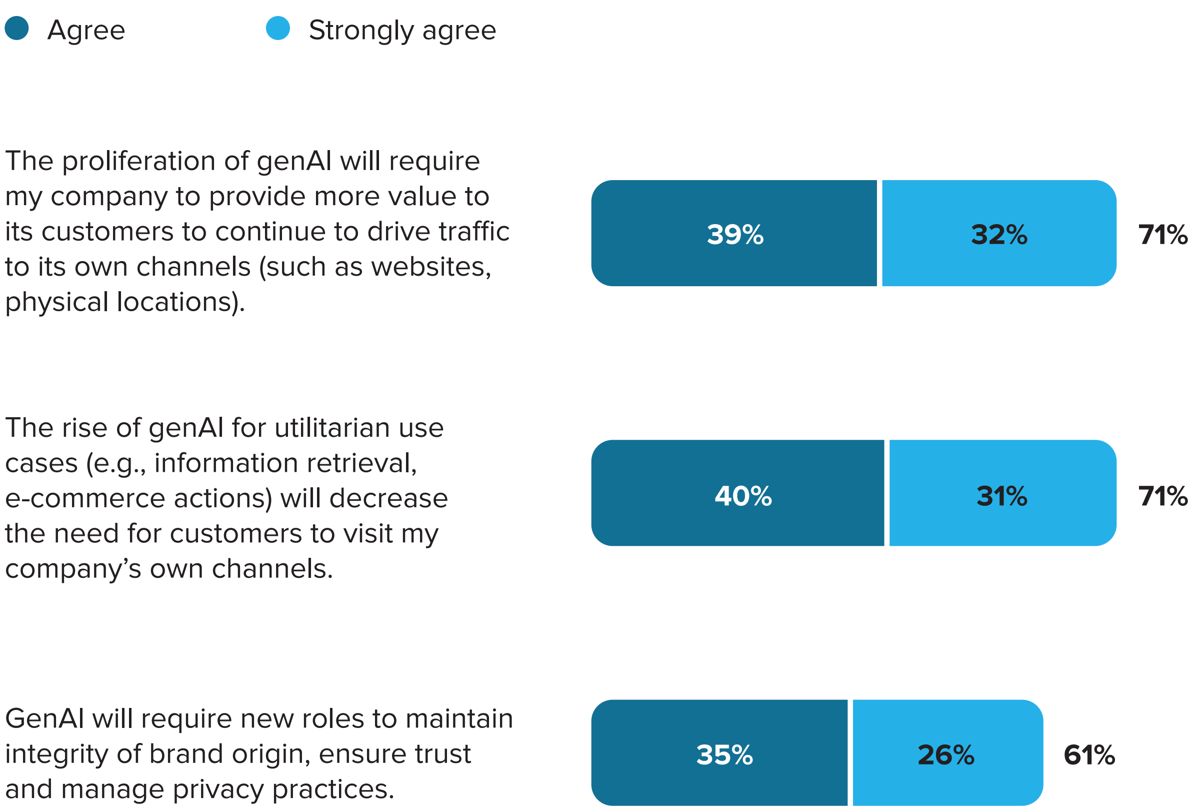


Base: 647 respondents involved with personalisation strategies at their organisations
Note: Showing three responses
Source: Forrester's Q1 2025 Personalisation Strategy Survey [E-61927]

- **However, future strategy changes will be needed to account for genAI opportunities and risks.** Decision-makers reported that customer adoption of genAI will require new internal roles to maintain brand integrity, ensure trust, and address privacy and regulatory concerns. They also expect increased genAI adoption to decrease customer visits to traditional channels (such as websites, physical locations and so on). As a result, the majority of respondents (71%) believe they must identify opportunities to drive additional customer value if they expect customers to engage through traditional channels in the future (see Figure 27).

FIGURE 27 PERSONALISATION STRATEGY DECISION-MAKERS

Future Personalisation Strategy Implications Of GenAI For Organisations



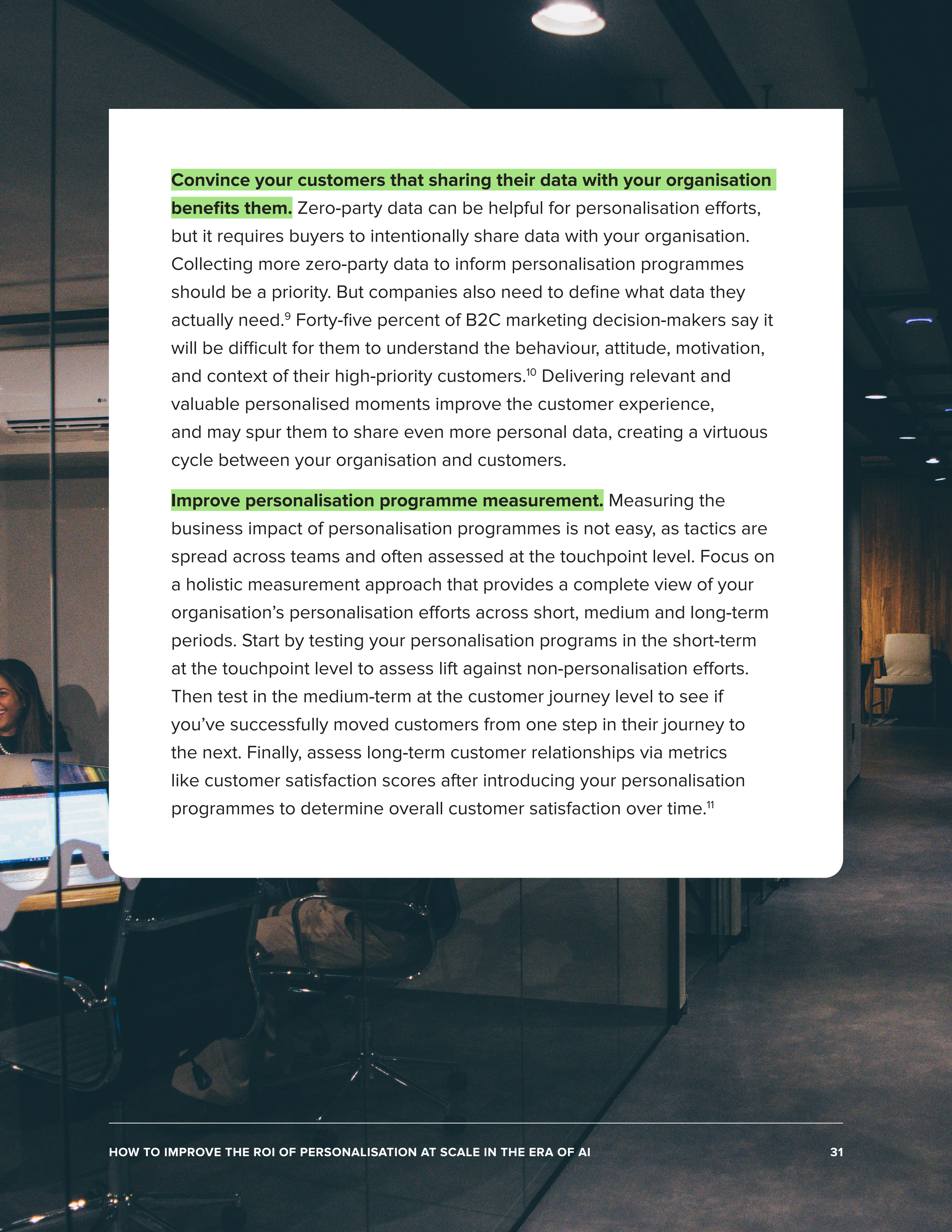
Base: 647 respondents involved with personalisation strategies at their organisations
Note: Showing three responses
Source: Forrester's Q1 2025 Personalisation Strategy Survey [E-61927]

Key Recommendations

While the majority of organisations have made strides scaling personalisation capabilities and can now deliver personalised experiences throughout the customer journey, many must still work on determining relevant moments that will add value for each customer. Forrester's study yielded several important recommendations for how organisations can improve the ROI of their personalisation at scale initiatives:

Understand and respect your customers. Buyers are generally unaware they are receiving personalised interactions. Instead, they assess an interaction with an organisation on whether it was relevant or provided value. Buyers view value across four dimensions: functional (i.e., usefulness), economic (i.e., money), experiential (i.e., interactions and sensations), and symbolic (i.e., meaning).[7]

Put your customers at the centre of your personalisation programmes. Many organisations prioritise business goals, such as driving sales, over customer goals. This leads businesses to focus on early-stage customer journey tactics like advertising, which is at odds with consumers/buyers who find these adverts invasive, irrelevant and of little value. the entire customer journey — our survey data reveals buyers find personalised interactions more valuable later in their buying journeys. Prioritise understanding, creating and delivering personalised moments that are first and foremost relevant to the customer and allow them to extract value from the moment. According to Forrester's 2024 Customer Obsession Survey, organisations that continually put the customer at the centre of leadership, strategy and operations have 51% better customer retention rates, 49% faster profit growth, and 41% faster revenue growth compared to their non-customer-obsessed peers.[8]



Convince your customers that sharing their data with your organisation benefits them. Zero-party data can be helpful for personalisation efforts, but it requires buyers to intentionally share data with your organisation. Collecting more zero-party data to inform personalisation programmes should be a priority. But companies also need to define what data they actually need.[9] Forty-five percent of B2C marketing decision-makers say it will be difficult for them to understand the behaviour, attitude, motivation, and context of their high-priority customers.[10] Delivering relevant and valuable personalised moments improve the customer experience, and may spur them to share even more personal data, creating a virtuous cycle between your organisation and customers.

Improve personalisation programme measurement. Measuring the business impact of personalisation programmes is not easy, as tactics are spread across teams and often assessed at the touchpoint level. Focus on a holistic measurement approach that provides a complete view of your organisation's personalisation efforts across short, medium and long-term periods. Start by testing your personalisation programs in the short-term at the touchpoint level to assess lift against non-personalisation efforts. Then test in the medium-term at the customer journey level to see if you've successfully moved customers from one step in their journey to the next. Finally, assess long-term customer relationships via metrics like customer satisfaction scores after introducing your personalisation programmes to determine overall customer satisfaction over time.[11]

Appendix A: Methodology

In this study, Forrester conducted two online surveys. The first survey included 1,181 buyers (589 consumers and 592 B2B buyers) across North America, Europe and APAC and evaluated their sentiment toward personalisation tactics used by the organisations they interact with via digital channels. Questions provided to the participants asked about their feelings toward the personalised moments they receive today and how the organisations they engage with can improve their experiences. The second survey focused on 647 personalisation decision-makers across North America, Europe and APAC and evaluated their organisations' personalisation strategies. Questions provided to the participants asked about their organisation's personalisation capabilities and business benefits experienced as a result of their initiatives in this area. Respondents were offered a small incentive as a thank-you for time spent on the surveys. The surveys began in December 2024 and were completed in January 2025.

Appendix B: Demographics

SURVEY 1: BUYERS (CONSUMERS & B2B BUYERS)

CONSUMERS

GEOGRAPHY	
United States	**31%**
India	**21%**
Australia and New Zealand	**11%**
United Kingdom	**11%**
Germany	**9%**
France	**9%**
Japan	**9%**

AGE GROUP	
Gen Z	**16%**
Millennials	**19%**
Gen X	**16%**
Boomers II	**16%**
Boomers I	**17%**
Post War/WWII	**16%**

INDUSTRIES ENGAGED WITH (TOP 10)	
Retail	**74%**
Energy and utilities	**60%**
Online television streaming (OTT)	**55%**
Financial services	**48%**
Travel	**46%**
Telecom	**43%**
Technology	**37%**
Hospitality	**36%**
Insurance	**31%**
Healthcare	**30%**

B2B BUYERS

GEOGRAPHY	
United States	**31%**
India	**19%**
Australia and New Zealand	**10%**
United Kingdom	**10%**
Germany	**10%**
France	**10%**
Japan	**9%**

INDUSTRY	
Financial services/insurance	**14%**
Tech/tech services	**13%**
Manufacturing and materials	**8%**
Retail	**7%**
Healthcare	**7%**
CPG	**6%**
Transport and logistics	**6%**

DEPARTMENT (TOP SIX)	
IT	**20%**
Operations	**18%**
Finance/accounting	**15%**
Customer support	**10%**
HR/training	**10%**
Sales	**10%**

INDUSTRIES ENGAGED WITH AS REPRESENTIVE OF ORGANISATION (TOP 10)	
Technology	**56%**
Financial services	**30%**
Retail	**28%**
Travel	**28%**
Telecom	**24%**
Insurance	**23%**
Hospitality	**21%**
Energy and utilities	**19%**
Education	**18%**
Healthcare	**16%**

RESPONDENT LEVEL	
Corporate executive	**13%**
Vice president	**17%**
Director	**24%**
Manager	**22%**
Project manager	**13%**
Full-time practitioner	**13%**

COMPANY SIZE	
500 to 999 employees	**17%**
1,000 to 4,999 employees	**35%**
5,000 to 19,999 employees	**29%**
20,000 or more employees	**20%**

SURVEY 2: PERSONALISATION DECISION-MAKERS

GEOGRAPHY	
United States	**32%**
India	**13%**
Australia and New Zealand	**13%**
United Kingdom	**11%**
Germany	**11%**
France	**11%**
Japan	**9%**

RESPONDENT LEVEL	
Corporate executive	**22%**
Vice president	**35%**
Manager	**43%**

COMPANY SIZE	
500 to 999 employees	**23%**
1,000 to 4,999 employees	**40%**
5,000 to 19,999 employees	**22%**
20,000 or more employees	**15%**

Note: Percentages may not total 100 due to rounding.

INDUSTRY	
Financial services/insurance	**21%**
Tech/tech services	**21%**
Retail	**21%**
Travel/hospitality	**19%**
Broadcast video/OTT and telecommunications	**18%**

DEPARTMENT (TOP SIX)	
Operations	**14%**
IT	**13%**
Marketing/advertising	**13%**
Sales	**12%**
Data, insights, analytics	**11%**
Customer experience	**9%**

BUSINESS MODEL	
B2B	**22%**
B2C	**12%**
B2B and B2C	**66%**

Appendix C: Supplemental Material

RELATED FORRESTER RESEARCH

Understand Your Audience To Design Better Personalisation Initiatives In 2025, Forrester Research, Inc., April 24, 2025.

Personalisation Should Pervade The Entire Customer Lifecycle, Not Just The Buying Journey, Forrester Research, Inc., January 14, 2025.

The State Of US Consumer Personalisation, 2024, Forrester Research, Inc., December 9, 2024.

The State Of B2B Personalisation, 2024, Forrester Research, Inc., December 14, 2024.

Use Personalisation To Activate Loyalty Program Value, Forrester Research, Inc., September 25, 2024.

A Technology Overview Of Consumer Personalisation, Forrester Research, Inc., June 6, 2023.

A Measurement Approach For Consumer Personalisation, Forrester Research, Inc., March 15, 2024.

ADDITIONAL RESOURCES

Jessica Liu, Consumers Are Lukewarm About Your Company's Personalisation Efforts, Forrester Blogs.

Jessica Liu, For Measuring Your Personalisation Programs, The Number Of The Day Is … Three!, Forrester Blogs.

Jessica Liu, Ready, Set, Go! Get A Quick Start On Your Consumer Personalisation Strategy, Forrester Blogs.

Jessie Johnson, Seven Ways To Use GenAI For B2B Personalisation, Forrester Blogs.

October 10, 2023, Personal But Not Creepy: Personalisation Attitudes And Altitudes In B2B Marketing, Webinar.

Appendix D: Endnotes

[1] Source: Use Personalisation To Activate Loyalty Program Value, Forrester Research, Inc., September 25, 2024.

[2] Source: Stephanie Liu, Zero-Party Data: The Gift That Keeps On Giving, Forrester Blogs.

[3] Source: The State Of Zero-Party Data Platforms, 2024, Forrester Research Inc., May 20, 2024.

[4] Source: The Anatomy Of A Moment, Forrester Research Inc., April 12, 2022.

[5] Source: The State Of B2B Personalisation, 2024, Forrester Research Inc., December 13, 2024.

[6] Source: Shift Generative AI In Martech From Theory To Reality, Forrester Research Inc., November 6, 2024.

[7] Source: The State Of US Consumer Personalisation, 2024, Forrester Research Inc., December 9, 2024.

[8] Source: The State Of Customer Obsession, 2024, Forrester Research Inc., May 6, 2024.

[9] Source: How To Collect Zero- And First-Party Data You'll Actually Use, Forrester Research Inc., June 22, 2023.

[10] Source: The State Of Zero-Party Data Platforms, 2024, Forrester Research Inc., May 20, 2024.

[11] Source: A Measurement Approach For Consumer Personalisation, Forrester Research Inc., March 15, 2024.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