

2026

Guide to Next.



Fight for
what's
possible

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Editor's Note

Every year, "Guide to Next" is our chance to take a clear-eyed look at what's coming. But this year, the stakes feel higher—the decisions heavier, the bets bigger. Leaders told us they're walking into 2026 with equal parts optimism and unease. The phrase that stuck with us was this: optimistic uncertainty.

That tension is real. Across Publicis Sapient's own industry surveys, the majority of executives say their AI technology and programs are scaled or enterprise ready. Yet our data, and the experts we spoke with, reveal a different story: most organizations are still in pilot mode.

Confidence is outpacing capability, and that gap has become the new fault line in enterprise AI. It's what our research calls decision debt: when optimism moves faster than evidence, and assumptions scale before systems do.

Here's where the cracks are starting to show, and the fights in front of every organization in 2026:

- **Originality vs. sameness.** If you let off-the-shelf AI dictate your choices, you'll look and sound like everyone else. Efficiency without distinctiveness is a race to the bottom.
- **Breakthrough vs. bottleneck.** Put agents to work to shorten delivery cycles, run tests and reimagine design. Then scale with intent, powered by data that's clean, connected and governed like the asset it is.
- **Decisions vs. deferrals.** Years of tech debt have piled up: old systems, deferred decisions, fragile fixes. Agentic AI won't cover those cracks; it will make them impossible to ignore.
- **Routine vs. reinvention.** Redefine roles. Put humans in the loop for judgment, ethics and context. Build systems that reflect who you are, not just what's cheapest or easiest.

"Guide to Next 2026" is both a map and a mirror: a look at where markets are headed and a reflection of how ready leaders truly are. Across every sector we studied, ambition is high, but alignment still lags.

Winning now means closing that distance. It means turning confidence into capability, not just in what you build, but in how you govern, measure and lead. The bold moves ahead won't just be technological; they'll be structural, cultural and human.

Don't play it safe. Dare to prove your optimism right.

Your systems are already shaping your future. The only question is: are they fighting for you or against you?

-The Publicis Sapient Editorial Team



Guide to Next 2026:

Quick takes

Financial Services

A \$124 trillion wealth transfer is underway, and firms must shift from products to life-centered journeys.

Retail

AI will soon power every corner of retail, and success depends on encoding your brand identity.

Consumer Products

Buying decisions are moving to machines, and brands that fail to make their data readable will disappear.

Transportation & Mobility

Cars are becoming connected commerce platforms. The winners will design for real driver needs.

Healthcare

AI's biggest impact will come from fixing access, not diagnosis — starting with the invisible systems that delay care.

Energy & Commodities

The companies that win won't be those with the most assets, but those that decide fastest and best.

Telecom, Tech & Media

Audiences are fragmenting. Growth now depends on personalization, trust and smarter use of data.

Travel & Hospitality

Distribution is being rewritten by AI, influencers and digital identity. Attention is the new currency.

Words that will *define 2026*

Excitement
Partnerships
Algorithmic alchemy
Nervousness
Fear
Disillusionment
Cost management
Empowerment
Partnerships
Disillusionment
Beginning of the shakeout
Continuous learning

Automation
Doubt
Hyper personalization
Reversion to the mean
Reinvent
Agentic
Nostalgia
Fragmentation
Inflection
Governance
Metabolism

Disruption

Industry *Provocations*

Bold takes on every major sector



Retail Depends on AI That Encodes Identity, Not Just Efficiency

AI will soon power every corner of retail. What will separate leaders from laggards is whether customers can still tell them apart.

QUICK TAKE

AI will touch every part of retail, from pricing to service to marketing.

If brands use it only for cost savings, they will become indistinguishable from competitors.

The retailers that win will encode their brand values and customer promises directly into their AI systems.

AI won't erase brands; it will reveal their strengths and weaknesses.

By 2030, AI will power every corner of retail, from personalization and pricing to supply chain and operations. Cost-cutting may be part of retail's DNA, but it's a dangerous trap when it becomes the only goal of your AI efforts.

If every AI algorithm optimizes for efficiency alone, retailers will start to look and sound alike. When every system has the exact same goals—price, speed and efficiency—they will stop reflecting your brand, making you no different from your competitors.

Publicis Sapient's 2025 Guide to Next Retail Research found that most retailers are confident in their AI readiness and believe their AI systems already reflect their brand identity [Figure 1]. In reality, few actually know whether that's true, and few are able to measure it.

Retailers are reporting AI success faster than they're defining what it should stand for, a sign of ambition without direction. To make AI meaningful in 2026, retailers must first define what AI success looks like for their brand.

The confidence illusion

Across the retail industry, AI confidence is outpacing capability. Many retailers describe their AI systems as scaled enterprise-wide, but not many organizations can prove that with measurement or governance.



“Executives are mistaking generative AI experimentation, use of ChatGPT and Copilot, and/or machine learning usage for full AI integration. Confidence without measurement is belief, not certainty.”

Guy Elliott

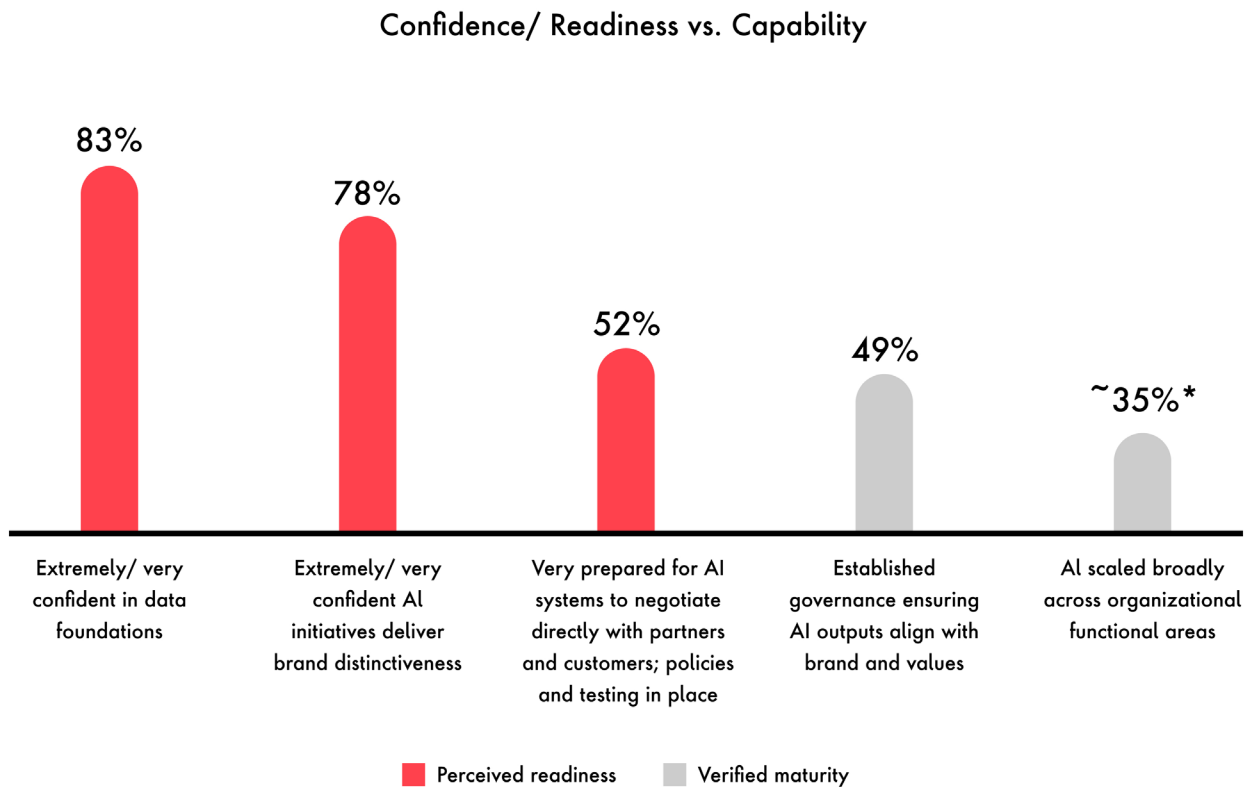
Consumer Products, Retail, Telco, Media & Tech Industry Lead, EMEA & APAC

Much of this confidence likely comes from success with traditional AI—predictive models and optimizations that have matured over years. But the next wave of generative and agentic AI demands a different kind of readiness: one rooted in governance, brand identity and trust.

Figure 1

Confidence and readiness outpace capability: Retailers overestimate AI readiness

Most feel ready for AI, but when it comes to scaling it responsibly—ensuring systems make decisions that fit their brand values—big gaps remain.



Publicis Sapient 2025 Guide to Next Retail Research. Q. How confident or not confident are you that your organization’s data foundations (e.g., product definitions, real-time inventory, customer identity, consent) are strong enough to scale AI successfully? Q. How confident or not confident are you that your organization’s AI initiatives deliver experiences that customers would see as distinctive to your brand? Q. How prepared is your organization for a future where AI systems negotiate directly with partners or customers on your behalf? Q. To what extent does your organization have governance processes to ensure AI outputs are aligned with your brand and values (e.g., product, service standards, sustainability commitments, customer experience style, cultural relevance, tone of voice)? Q. In which of the following areas is your organization currently using AI, and how far along is that use? N=157 (Retail leaders).

*35% represents the average percent of organizational departments broadly scaled. Refer to Figure 2 for the complete distribution of AI scaling across functions.

Pilot purgatory: the scale illusion

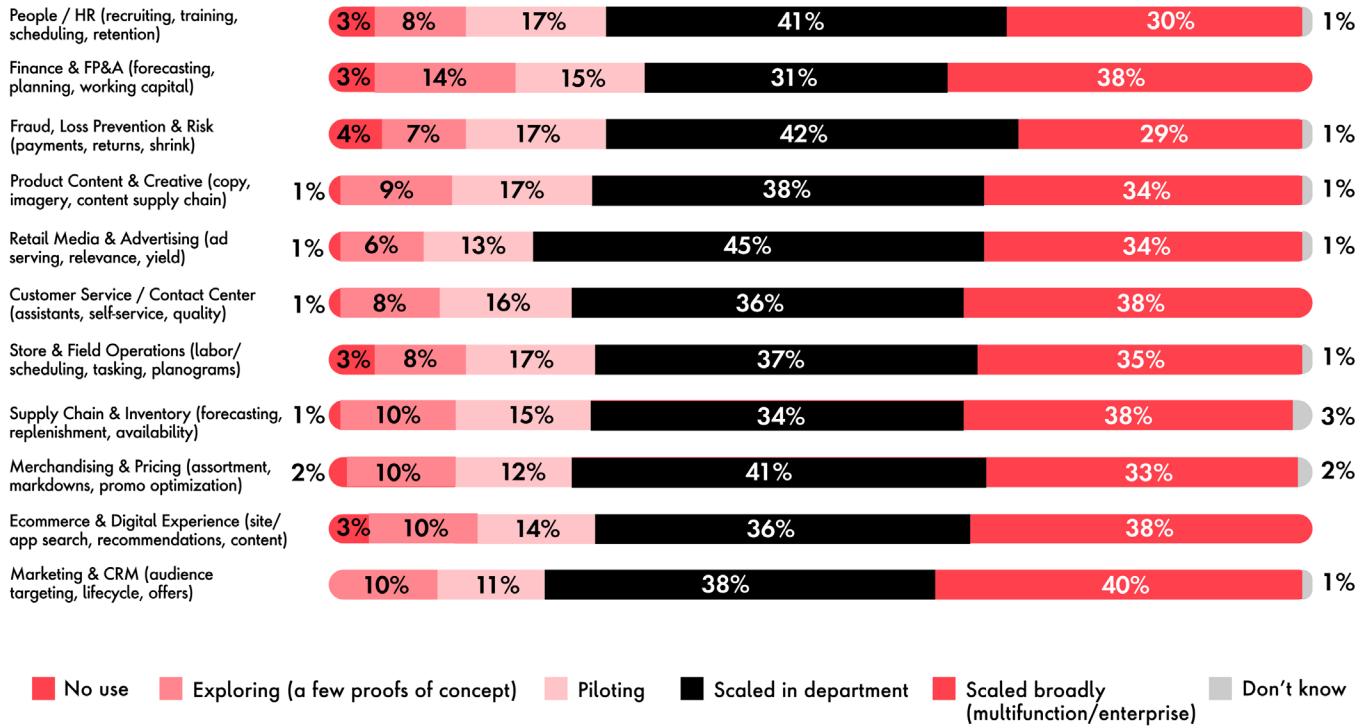
That misplaced confidence shows up in what we call pilot purgatory, when retailers believe they’ve scaled AI, but most initiatives are still stuck in test mode. Across 157 retail decision-makers, roughly one-third described their AI systems as scaled enterprise-wide, but most initiatives remain limited to pilots or departmental tests [Figure 2].

Figure 2

AI adoption is ubiquitous; true enterprise scale remains out of reach for most retailers

Most retailers have moved beyond proof of concept, but only a minority are broadly scaled, leaving brand experience and workforce enablement as the next growth horizon.

Organizational AI Maturity



Publicis Sapient 2025 Guide to Next Retail Research. Q. In which of the following areas is your organization currently using AI, and how far along is that use? N=157 (Retail leaders).

A Financial Times analysis reinforces this: [many companies now tout AI strategies, but few demonstrate measurable return](#), suggesting that fear of missing out still drives adoption more than value creation.

The disparity we see in confidence may also reflect this shift from traditional AI to generative and agentic AI. While most retailers have scaled predictive systems, few have yet tackled the governance, data quality and brand encoding required for autonomous, decision-making AI agents. In that sense, their confidence in maturity is real but may apply to yesterday's AI, not tomorrow's.

Brand in the age of AI

Despite this overconfidence and potential pilot purgatory, the need to scale agentic AI isn't a question of if but when. The danger is that the same executive overconfidence in AI success we see today could cause many to overlook all the factors needed to scale agents effectively: particularly the imperative to build AI systems that express, not erase, their brand.

Using AI for cost-cutting alone will be easier in the short term: the metrics are clear, and the payoffs are immediate. Defining and measuring AI's expression of your brand requires deeper thinking and longer-term intent.

In the age of AI, your brand isn't just a campaign anymore; it's a system of encoded distinctions, essentially the choices and rules that shape every customer interaction. That means that you need to design the AI agents and systems that decide prices, recommendations and messages to reflect the same priorities as your brand: fairness, quality, service or sustainability.

"Brand-distinct" AI will show up in the rules that determine how your products are ranked in search, how your prices fluctuate and how your AI agents interact with customers and their own AI agents. If these actions aren't deliberately encoded, AI defaults to pure optimization, and retailers will lose their identity.

Brand as the operating system of AI

That's why the next step is thinking of your brand as core to the operating system of AI.

Brand is not just a colorful layer on top of AI; it's the encoded expression of what differentiates one retailer from another. Just as your brand guidelines include tone of voice, in the new age of AI, your brand should also be the instruction manual that guides how your AI makes decisions day to day.

- **Are you a retailer of trust and fairness?** Then your pricing algorithms should reflect that.
- **Are you a retailer of service?** Then your copilots should embody excellence, not just efficiency.
- **Are you a retailer of sustainability?** Then your supply chain algorithms should elevate those signals.



“Retailers think if a chatbot sounds on-brand, the job’s done. But the real question is whether your systems behave like your brand - tone of voice, sure, but also company culture, strategic priorities, market differentiators and the way decisions get made.”

Guy Elliott

Consumer Products, Retail, Telco, Media & Tech Industry Lead, EMEA & APAC

How brand-encoded AI shows up in retail

So, what does this actually mean? While creating agentic AI systems is technical, the impacts are not.

1. Employees: service amplified, not automated away

Generic: Retailers replace staff with AI, turning associates into efficient robots.

Brand-encoded: AI copilots understand your brand’s unique approach to service and can even articulate it to human employees.

2. Pricing: exploitation vs. fairness

Generic: Dynamic pricing systems push elasticity to the breaking point, alienating shoppers.

Brand-encoded: Pricing reflects brand values, like lowering produce prices as they near expiration to reduce waste, or EDLC retailers minimizing cost 24/7 within margin limits or rewarding loyalty through fair discounts.

3. Marketing: sameness vs. creativity

Generic: AI generates hyper-personalized yet repetitive campaigns that blur together.

Brand-encoded: AI amplifies creative distinctiveness, producing campaigns that stand out from the rest, showcasing your brand’s core personality and values while still resonating with specific demographics.

Overall, every aspect of your brand that was once enforced by people, needs to be coded into your AI.

Data plumbing is retail’s Achilles’ heel,” said Julian Skelly, Retail Industry Lead, EMEA & APAC. “Fixing it will unlock the full potential of brand-encoded agentic AI and move it from theory to practice.”

Data foundations: the Achilles’ heel

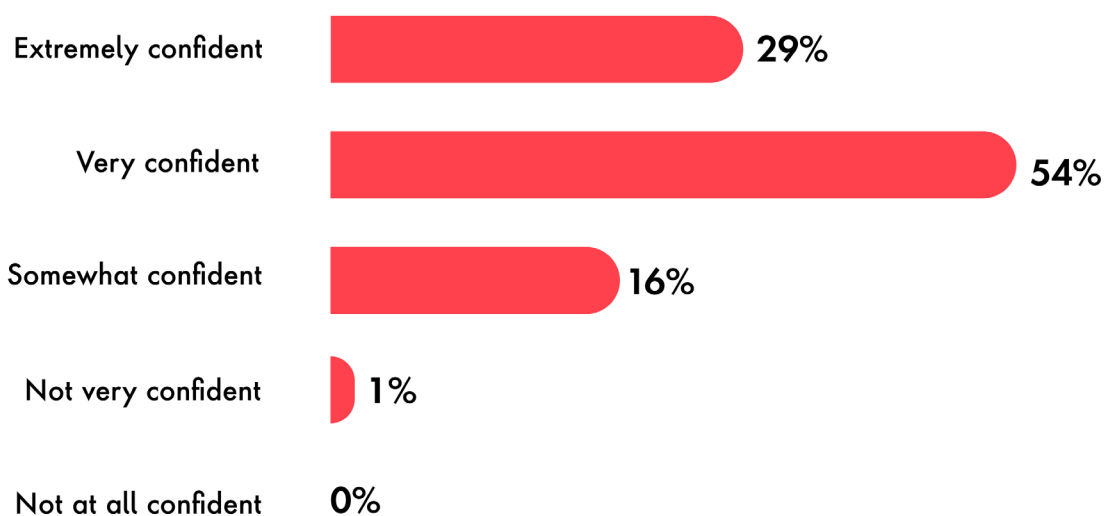
All of these brand-encoded use cases will depend on one main thing: clean, structured, real-time data. The behind-the-scenes data connections that power AI (i.e., data plumbing) are still a weak spot for retailers [Figure 3]. Without them, even the best algorithms can fail to result in the desired outcomes.

Figure 3

Perceived readiness masks shallow confidence in data quality

While 83 percent of retailers express confidence in their data foundations, only 29 percent are extremely confident, suggesting readiness feels more aspirational than proven.

Confidence in Data Foundations to Support AI at Scale



Publicis Sapient 2025 Guide to Next Retail Research. Q. How confident or not confident are you that your organization’s data foundations (e.g., product definitions, real-time inventory, customer identity, consent) are strong enough to scale AI successfully? N=157 (Retail leaders).

Agentic discovery: the next battleground

Fixing those data foundations matters even more in the next wave of agentic commerce. Agentic commerce, or agent-to-agent commerce, refers to intelligent systems that can act on a brand's behalf, transacting with other intelligent systems that can act on a retailer or consumer's behalf. It can recommend products, compare offers or even negotiate and transact with other systems.

Almost all retail leaders (96 percent) say they're prepared for a future where AI agents transact directly with customers. Our experts disagree; no retailer is truly prepared for agent-to-agent commerce, namely, because it doesn't exist.

What's emerging today is the preview, not the practice. ChatGPT commerce and similar experiences show what's technologically feasible, but brand-controlled agentic systems—those that negotiate and represent with integrity—are still aspirational.



“Having a chatbot is not the same as having a negotiating agent with brand authority. But that’s the future we’re building toward, where AI becomes your brand’s frontline.”

Guy Elliott

Consumer Products, Retail, Telco, Media & Tech Industry Lead, EMEA & APAC

In that future, brand-encoded systems will matter more than ever because these agents won't just represent your products, they'll represent your reputation across the entire value chain. If your AI can't express your brand's values, it risks fading into the background as just another interchangeable assistant.

Decision debt: optimism without governance

This gap between retailers' AI confidence and readiness is also known as **decision debt**, which occurs when executives announce AI success faster than their data, knowledge or governance can keep up, leading to an invisible acceleration of poor decisions that add up over time.

The real AI opportunity for retailers in 2026 lies in balancing ambition with verification, embedding governance and brand DNA into every AI investment.



“Confidence and optimism aren't the problem; verification is.”

Julian Skelly

Retail Industry Lead, EMEA & APAC

Choose soul, not sameness

As AI fully saturates retail, cost-cutting and efficiency will become the standard, not the end-goal. What will separate the leaders from the laggards won't be just speed of general AI deployment, but depth of differentiation through AI.

This will reveal which brands know who they are and which don't. The future won't reward technological sameness; it will reward brands that put soul into their systems.

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End of article

Keep reading: [Next: When Bots Shop, How Do Consumer Product Brands Win?](#) —>



When Bots Shop, How Do Consumer Product Brands Win?

AI agents don't buy promises. They buy proof.

QUICK TAKE

Buying decisions are shifting from humans to AI agents.

If product information is unclear or incomplete, brands will disappear from automated recommendations.

Organize and publish product data in ways machines can understand, and train brand agents to represent the company's true values.

Invisible negotiations shaping commerce

Your brand's AI agent is in a silent negotiation. A consumer's agent has just asked for "the best detergent." In milliseconds, your agent presents the facts: lowest unit price, certified sustainable, fastest shipping. Another brand's agent counters with a coupon. A third highlights superior stain removal. The consumer never sees this exchange, but the outcome decides who wins the sale.

This is the new shelf: invisible to people but imperative for growth.

The business problem: invisibility and unpreparedness

For decades, consumer decision-making followed a predictable pattern: marketing built, retailers controlled availability and awareness, retailer-controlled availability and loyalty programs kept shoppers in orbit.

In the agent-mediated world of agentic commerce, that logic collapses. Discovery no longer depends on a store shelf or a search ranking, it depends on what data an algorithm can see, read and trust.

According to Publicis Sapient's 2025 Consumer Products Industry Research, only 37 percent of brands run a monthly audit of how AI assistants describe them, while 25 percent do so just once a year. Even more concerning: no standard or automation exists for these audits, revealing a deep misunderstanding of readiness itself.



“If you’re not visible, you’re not here. This is the digital shelf of the future.”

Simon James

International Lead, GVP, Data Science & AI

If consumers turn to commerce agents that only see spec sheets, [the \\$43 billion U.S. consumer goods companies spend on advertising](#) each year could vanish into a single line on a spreadsheet.

The opportunity: a once-in-a-generation reset

Helen Merriott, Consumer Products Industry Lead, EMEA & APAC, frames it bluntly: “Invisibility, competitor threat and unpreparedness—that’s the business problem. But the opportunity is as big as social media’s impact on commerce.” Agentic commerce upends the retailer-dominated model of the past century.

Brands that once rented shelf space can now own their visibility, if they build for machines, not people.

But Publicis Sapien's 2025 Consumer Products Research shows how far brands still have to go:

- Only **37 percent** of brands audit how AI assistants describe them monthly—and just **four percent** of brands less than once a year.
- Only **33 percent** say their product data is “very consistent” across channels.
- Only **36 percent** describe their data as “fully structured and machine-readable.”

In other words, the shelf is collapsing, but the window to rebuild it is open.



“Most CPGs think they’re fully mapped, but they don’t know what they don’t know.”

Simon James

International Lead, GVP, Data Science & AI

Mobile changed how, agents change who

At first glance, agent-to-agent commerce might seem like another passing hype cycle. Yet, much like how mobile technology redefined how people connect, agents have the potential to redefine who is doing the connecting.

Campaigns once driven by imagery and emotion must now be underpinned by structured facts—because algorithms don’t care for clever taglines. They parse clarity, comparability and proof.

Most CPG leaders believe in this future but overestimate their readiness for it.

According to Publicis Sapien’s 2025 Consumer Products Research, Sixty-four percent claim to have a company-wide strategy for influencing how AI tools (like ChatGPT) describe their products, yet many of these strategies remain largely theoretical, as this future is still in its early stages.



“This strategy belongs in the boardroom. You need a Chief AI Officer to translate business goals into data structures that agents can read and rank.”

Helen Merriott
Consumer Products Industry Lead, EMEA & APAC

Proof from the field: five gaps that define risk

Publicis Sapien’s 2025 Consumer Products Research identifies five readiness gaps that define the next competitive fault line:

- 1. The audit gap** – Only 37 percent audit monthly; four percent audit less than once a year. Most lack automation or defined processes [Figure 1].
Insight: Auditing isn’t checking a few SKUs manually; it’s a continuous process that tracks how AI assistants describe thousands of products in real time.
- 2. The control gap** – Retailers dominate visibility: 68 percent rely on retailer sites versus 52 percent on brand.com [Figure 2].
Insight: Even “brand-managed” retail pages live inside retailer ecosystems, meaning brands still don’t control what algorithms read first.
- 3. The data gap** – Only 33 percent report very consistent product data across channels.
Insight: Inconsistency is the new invisibility. If your facts conflict across feeds, agents will choose the competitor with cleaner data.

4. The accountability gap – 39 percent have a dedicated AI discovery lead, while the rest divide responsibility across digital and brand teams.

Insight: Ownership remains fragmented; brands are treating an existential issue as a task, not a mandate.

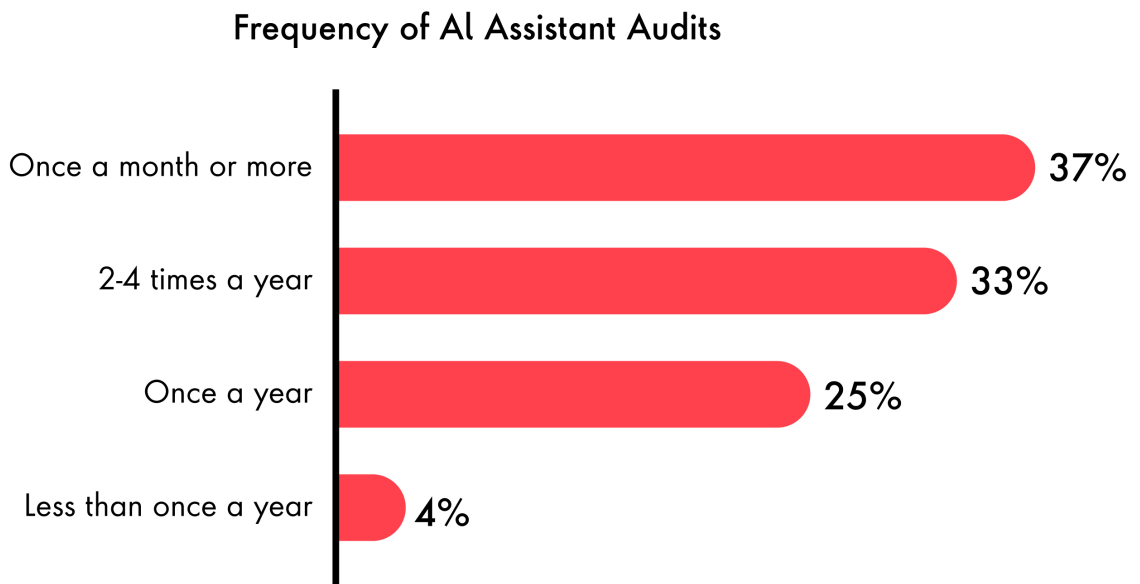
5. The perception gap – 63 percent worry competitors will appear more prominently in AI results, but fewer than a third act with urgency.

Insight: Brands know what’s coming; they just assume it’s a tomorrow problem.

Figure 1

Most brands check their AI shelf too infrequently to stay visible

With only one-third auditing monthly, most brands risk letting errors or competitors shape the narrative.



Publicis Sapient’s 2025 Guide to Next Consumer Products Research. Q. How frequently does your organization audit how external AI assistants (e.g., ChatGPT, Gemini, Perplexity) describe your products and category? N=157 (CPG leaders).

The agent era, in three acts

The rise of agent commerce won't happen all at once. It will unfold in phases, each one reshaping brand strategy:

- 1. Today: ChatGPT as shortcut.** Consumers already use AI to search the web for recommendations. [ChatGPT sees more than 2.5 billion requests daily](#), which means your product data is already being scraped, whether you're prepared for it or not.
- 2. Near future: ChatGPT as a storefront.** As consumers offload low-consideration decisions ([nearly 77 percent of U.S. consumers use AI to make faster decisions already](#)), they stop scrolling Google, Reddit or Amazon, and go straight to AI tools for transactions. That means fewer human touchpoints, fewer banner ads and a rising premium on data trust signals. The brands that win will build trust signals, like proof of authenticity, sustainability and performance, into the data itself.
- 3. Far future: Agent-to-agent commerce.** Personal devices will default to AI agents, and brands must meet them with commerce agents of their own. Bots will negotiate directly on price, availability, delivery speed and trust signals. To compete, brands will need autonomous agents, codified negotiation rules and embedded brand values. Designing and managing a brand agent will be as essential as owning a website today.



“Within 24 months, agents will be as important as influencers in shopping choices.”

Helen Merriott

Consumer Products Industry Lead, EMEA & APAC

CX meets AX: two shopping missions, two playbooks

The future splits in two: agents handle convenience missions, while humans still drive experience missions. And because many consumers will still double-check results or distrust a bot's judgment, CX storytelling and human-designed experiences remain even more essential for trust.

Agents on **convenience missions** will be like digital concierges, checking stock, comparing prices and replenishing essentials. The transaction is fast, functional and invisible. Yet "convenience" can live in the luxury space too: think of a high-net-worth individual who must have that handbag and wants it delivered within hours.

Experience missions are driven by inspiration, aspiration or curiosity, like browsing handbags on vacation, or rediscovering joy in a weekend grocery or homewares shop. Here, customers seek engagement and storytelling. Even routine categories can become experience-led when time and attention allow.

The future isn't CX versus agent experience (AX). It's CX layered with AX, shifting dynamically with consumer intent. Machines may make the shortlist, but humans still need a reason to care. For brands, this creates a richer field of play: one where context defines the mission, and the best experiences seamlessly bridge both.



Figure 2

Most brands are present across digital channels, but not everywhere that agents look

Roughly two-third of CPG leaders believe their product information is consistent across retailer and social commerce sites, while only about half maintain consistent publication across owned sites and partner channels, leaving visibility gaps in the very places AI assistants source information.

Consistent Product Publication Across Digital Channels



Publicis Sapient’s 2025 Guide to Next Consumer Products Research. Q. On which digital channels are your product information consistently published today? N=157 (CPG leaders).

Beyond visibility: the data dividend

The prize for machine-readable data goes beyond visibility. Agent-driven discovery gives brands better demand, lower costs to acquire customers and richer feedback. Imagine not just tracking what sold but knowing why an agent or AI tool recommended it (i.e., fragrance-free, certified sustainable or diet friendly). That intelligence powers the next level of personalization and product innovation.

For challenger brands, this may be the best opening in a generation, because [research already shows that agents don’t favor history or scale](#) but structured clarity.

Beware the new middlemen

But the fall of one gatekeeper risks the rise of another. Aggregators are already testing platform commerce agents that scrape brand data and insert themselves between consumer and product.

Agents already influence what shows up in social feeds, invisibly curating exposure to brands beyond paid ads, which is a preview of how algorithmic mediation is expanding from content to commerce. Without an AX strategy, companies may simply swap one middleman for another.

Flight booking is a cautionary tale: by the late 2000s, [travel aggregators like Kayak and Skyscanner were pulling in millions of users a month](#) by scraping airline sites. Airlines were then forced to pay hefty referral fees to reach customers they already had.

The same dynamic could hit consumer brands: either be invisible to commerce agents or pay margin-killing tolls to intermediaries. Avoiding this fate requires a different set of priorities than most leaders are tracking today.



“Retailers and marketplaces still dominate discoverability, but this is the moment to leapfrog them. Consumer products firms spend more on data and AI than retailers do.”

Helen Merriott

Consumer Products Industry Lead, EMEA & APAC

What leaders should know: The new rules of AX

Here are the concepts that matter now:

- **AX isn't SEO.** Treating agent experience (AX) like a checklist is the fastest way to lose. It belongs in the boardroom because it affects the entire operating model. Product teams must design with codifiable proof points, like sustainability certifications, provenance and performance claims.
- **Training data is the new media buy.** The real fight is getting your facts and values into the sources AI agents draw from.
- **Your brand isn't a place, it's a feed.** Think of it as a stream of structured facts flowing into the machines that make choices for your customers.
- **In the future, brands will be judged by their agents.** Consumers may never see most of your ads or promotions. What they see is what their AI agent decides.

The takeaway

The shelf is no longer rented space in a retailer's aisle but a contest of clarity, structure and trust. Done right, AX can be transformative: a challenger brand coding every claim to leapfrog incumbents or a luxury house proving not just that a bag is leather, but that it is ethically sourced and guaranteed.



“This will be winner-takes-all in AI terms. Whoever becomes the default for ‘best detergent’ wins everything.”

Simon James

International Lead, GVP, Data Science & AI

Contributors: Simon James (International Lead, GVP, Data Science & AI), Helen Merriott (Consumer Products Industry Lead, EMEA & APAC) Erin Doyle (Director Customer Experience & Innovation Consulting, Delivery, Experience) Amin Rafinejad (Senior Client Partner, Sales & Leadership, Industry Sales)

End of article

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Research Methodology



This report is based on internal qualitative interviews and a quantitative survey conducted by IPSOS in September 2025, spanning five industries: Consumer Products, Retail, Transportation & Mobility, Telecommunications, and Media. The study captured insights from nearly 70 Publicis Sapient strategy, product, engineering, customer experience, data and AI experts who participated in 30-minute in-depth interviews and 540 senior decision-makers in digital transformation across seven markets: the United States, United Kingdom, Germany, France, China, Australia, and Italy. Markets were selected for their leadership in shaping global industry standards and innovation.

Industry	Total	US	UK	Germany	France	China	Australia	Italy
Transport & Mobility	89	23	20	15	16	0	0	15
Media industry	91	20	15	17	17	0	22	0
Telecom industry	86	20	18	17	16	0	16	0
Retail	157	32	32	31	32	0	30	0
CPG	157	31	34	31	30	31	0	0
Total	540	126	119	111	111	31	67	15

Respondents were C-Suite leaders or direct reports with recognized expertise and decision-making authority. They represented functions including executive leadership, IT, marketing, customer experience, operations, procurement and supply chain, strategy and transformation (including AI), finance, innovation and R&D, data and analytics, and engineering. Eligibility required a senior management role (minimum one year in position) at organizations with revenues of \$1B+ and workforces of 1,000+. All participants had direct responsibility for, or influence over, selecting external consultants and service providers for digital transformation.

Fieldwork was conducted via secure, self-completed online questionnaires in local languages, adhering to market research guidelines, confidentiality, and data protection standards. Results were analyzed at industry and total levels, with significance testing at the 95% confidence interval to identify meaningful differences.

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