2026

# Guide to Next.


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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*

Automation

Excitement

Doubt

Hyper personalization

Partnerships

Reversion to the mean

Algorithmic alchemy

Nervousness

Reinvent

Disruption

Fear

Disillusionment

Agentic

Nostalgia

Cost management

Fragmentation

Empowerment

Inflection

Partnerships

Governance

Disillusionment

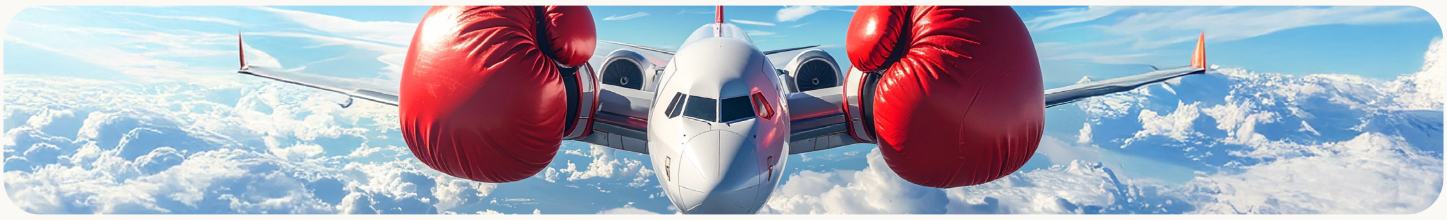
Beginning of the shakeout

Metabolism

Continuous learning

# Industry *Provocations*

Bold takes on every major sector



# The Attention Wars Are Coming for Travel & Hospitality

**The next disruptors are coming from unexpected places.**

**QUICK TAKE**

The fight for traveler attention is expanding beyond traditional booking channels.

Influencers, AI assistants and lifestyle platforms are already shaping choices.

Travel brands should pilot direct data feeds, flexible pricing and creative partnerships that meet travelers wherever they are.

## Who controls travel in 2026?

Travel distribution has always felt like an exclusive party. Hotels, airlines and online travel agencies (OTAs) take turns playing host, deciding who gets past the velvet rope of inventory and loyalty programs.

But 2026 is shaping up differently. The velvet rope is fraying, new rooms are being added to the club and uninvited guests, armed with new technologies and cultural clout, are already inside.

## The conversation is too small

For years, the industry has obsessed over a narrow distribution battle: OTAs versus direct bookings versus the remnants of Global Distribution Systems (GDS). OTAs and GDSs are still growing, but their growth rates are slowing. Direct hotel bookings are projected to outpace OTA bookings by 2030, and yet, the GDS market itself is expected to double by 2031.

At the same time, younger travelers are shifting to to TikTok, AI channels and portable digital identities.

In the future, distribution will no longer be just about your OTA vs GDS. It is about your control of attention, trust and the data that shapes traveler interactions everywhere.

## AI as a new channel

AI opens new paths for travel direct distribution, from verified brand data feeds to attribute-level pricing that lets travelers build stays feature by feature.

### Agentic commerce

Travelers are starting to trust AI platforms not just for inspiration but for price comparisons and booking. Today, most of these tools still rely on OTA data, but Model Context Protocol (MCP) gives hotels and airlines a way to supply verified content directly. In practice, it's a way to teach AI assistants your official data instead of letting them scrape it elsewhere.

Adoption won't happen overnight, but brands can begin by piloting MCP in a few markets and working with partners who understand how to format the data.

### Attribute-level pricing

Travelers increasingly want to build their stay piece by piece, choosing the view, breakfast or activities that matter most. OTAs already excel at merchandising these add-ons, while many brands still sell fixed packages.

To compete, hotels need to break out individual features and make that information machine-readable so AI assistants can surface them in search.

## Influencers are the new gatekeepers

A creator livestreams from a Kyoto ryokan, and viewers book the same room in real time. The line between inspiration and transaction disappears.

This shift to influencers is already visible in retail, and travel is beginning to follow. According to Expedia's 2025 Traveler Value Index, more than 70 percent of travelers have booked a trip based on an influencer's recommendation. Platforms such as YouTube and TikTok are adding booking features that allow creators to handle the entire journey from idea to purchase. The next large-scale distributor of travel could be a creator collective, a lifestyle platform or an AI tool that connects everything together.

For travel brands, influencers should be seen as distribution partners, not just a source of awareness. The opportunity is to work with creators on campaigns that let travelers' book directly from the content they are already watching.

## Experience marketplaces and lifestyle bundles

The next travel disruptors could be wellness apps or music festivals, packaging flights, hotels and experiences in one seamless bundle.

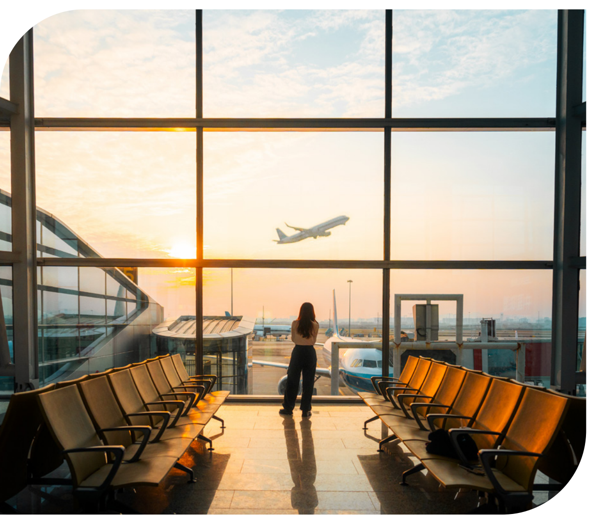
This experience marketplace approach is already gaining traction. The global super-app market is projected to reach $918 billion by 2033, and, in Singapore, more than half of consumers use super-apps every week. A super-app for travel could combine services such as payments, shopping, messaging and excursions, creating a one-stop shop for vacations and daily life.

While these decentralized marketplaces won't replace OTAs, they will draw valuable customers by embedding travel into lifestyle ecosystems. Right now, only 14 percent of travel brands currently meet Gen Z's digital expectations. For brands, the opportunity is to experiment with experiential partnerships that bundle travel in ways customers already value.

## Identity without intermediaries

Today, hotels, OTAs and airlines hold all traveler data. Self-sovereign identity (SSI) flips that model, giving travelers portable "loyalty wallets" that brands connect to rather than store themselves. A guest could arrive at any hotel or airline and be recognized instantly, with preferences and status intact.

This shift is already underway. India's DigiYatra has already handled more than 60 million journeys, while the EU Digital Identity Wallet will launch across borders in 2027.



Brands will still collect their own guest data, but these efforts often fall short and provide only a narrow perspective. SSI expands the view by enabling instant, verified insights from beyond a brand's own ecosystem. Imagine a passenger arriving at your counter with gold status at a rival airline and verified in real time through SSI. How would you treat that passenger differently?

The balance of power is slowly moving from corporations to individuals, forcing brands to rethink loyalty. Yet only 15 percent of travel companies can currently segment effectively across paid and owned channels.

The opportunity for brands is to join early pilots and design loyalty models that thrive in a decentralized environment.

## Risks in a decentralized future

As with anything, sometimes too much choice isn't a good thing—and the new decentralization party will not be simple. Too much distribution fragmentation will overwhelm travelers—how do they know what's best if every influencer, micro-marketplace and AI platform becomes a booking gate? Trust will also be an important and elusive KPI to measure.

Global adoption of certain technologies (SSI) will also likely fracture along regulatory lines, with MENA and India piloting bolder models while Europe and the United States wrestle with privacy and compliance.

## The first to the dance floor

However, every system has a moment where the rules flip overnight. For travel and hospitality, the only question is when.

It could be an influencer marketplace suddenly rivaling an OTA in volume, a government mandate that forces digital identity standards or a hotel chain bold enough to integrate directly into AI assistants. Then the floodgates break open, and everyone else is pressured to catch up.

The last decade's fight was over distribution control: OTAs, GDS, brand.com. The next decade's fight is about cultural and algorithmic control: who captures attention, who carries identity and who the AI concierges "choose" to show.

The real question for travel leaders is who will be first in adapting, setting the path for everyone else.

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**End of article**

**Keep reading: Next:** Research Methodology →

# 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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To compete, businesses must translate a customer-first strategy into practice. We enable this through long-term profitable growth anchored in customer acquisition, loyalty and value. We create innovative, data-informed moments that drive new customers to your brand and enhance the employee experience. From monetizing customer data to building innovative customer journeys, we nurture value-based relationships that power loyalty and profitability alike, reducing friction points and turning customer support into a value center.

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