

2026

Guide to Next.



Fight for
what's
~~possible~~

publicis
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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.

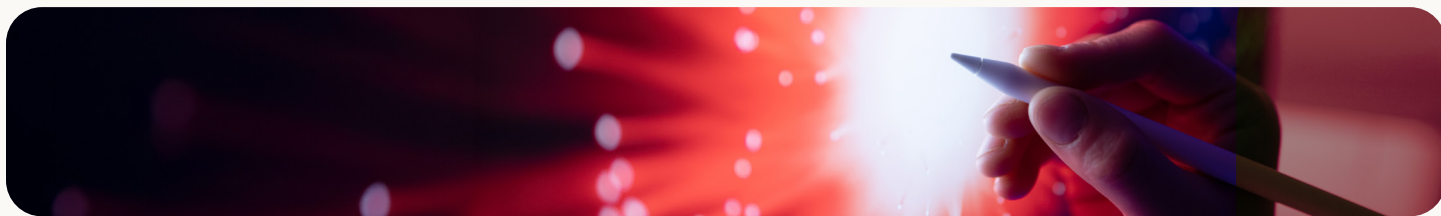
"Guide to Next 2026" is both a map and a mirror: a look at where markets are headed and a reflection of how ready leaders truly are. Across every sector we studied, ambition is high, but alignment still lags.

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

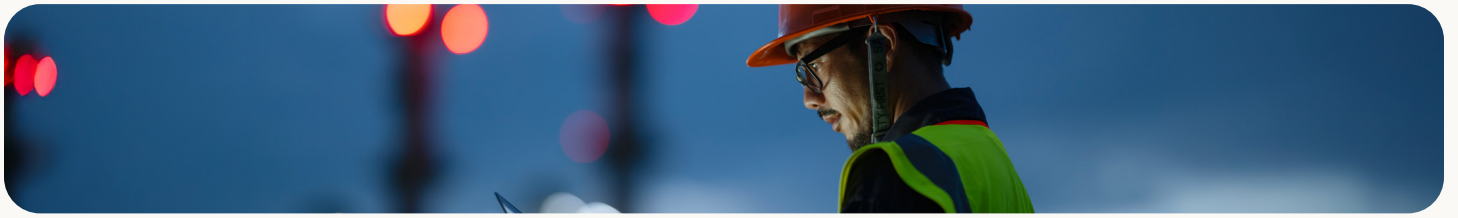
Distribution is being rewritten by AI, influencers and digital identity. Attention is the new currency.

Words that will *define 2026*



Industry *Provocations*

Bold takes on every major sector



Energy's Real Power Shift Comes from Decision Making, Not Supply

The energy edge in 2026 won't come from supply or technology. It will come from leaders who can make the right call before anyone else.

QUICK TAKE

The industry faces extreme volatility and rising complexity.

Real advantage comes from faster, better-informed decisions across the value chain.

Leaders should connect siloed systems, share live data and use AI to coordinate decisions that maximize profit and resilience

Volatility demands faster calls

Picture this: A geopolitical crisis suddenly erupts, sending shockwaves through global oil supply chains. At the same time, an unexpected surge in demand strains energy reserves. You need to make quick decisions that have an impact across your value chain.

This is likely what's in store for 2026. The demand for [utilities is expected to jump 25 percent](#) by 2030, while [uncertainty surrounding oil production and demand](#) persists. At the same time, the rise of power-hungry data centers, volatile oil prices, renewables integration and ongoing supply chain disruptions in an unpredictable geopolitical environment will cause even more turbulence.

Your edge in 2026 won't be the power of your tech, but the speed of your decisions. To make these kinds of decisions, you need to improve how all parts of your business work together by cutting across functional silos.

AI-powered value chain optimization (VCO)—a holistic process that fine-tunes every part of the value chain and breaks down the silos that sabotage them—does just that by aligning different units and functions to the shared goal of company profitability. It makes it easier for you to stay light on your feet and make fast decisions at the speed of markets.

Silos are holding companies back

Many leaders think they need better silos. In fact, silos are the problem. In the energy industry, businesses are often siloed into oil production, manufacturing and sales; for power & utilities, it's generating power and delivering it to customers. These silos come with their own teams and geographies, creating a tangled web of redundant organizational charts.

The issue is that these silos make it difficult to make timely decisions. For example, trading desks and wind farms aren't always connected, and this can lead to missed opportunities. The trading desk might know how to make the best returns, but if this information doesn't reach the people planning new wind farms, important decisions are made without the full picture. This gap results in potentially lost profits.



“What people are realizing is that optimizing functional silos isn't enough. You need to optimize the system as a whole and break down those silos.”

Masud Haq
Senior Vice President

That's not just a theory. [According to Publicis Sapient & AWS 2025 Energy Research](#)), 79 percent of energy leaders expect better data quality and reliability from integration efforts, 67 percent expect greater agility and 52 percent expect cost savings. Breaking silos isn't a nice-to-have; it's the path to resilience.

VCO supercharges your ability to make decisions

Phillips 66 learned the value of connecting its value chain by rolling out a VCO solution that cut across functional silos, slashed wasteful spending and built substantial savings. The result? The company [saved millions](#).

VCO is like the central nervous system in a body. Individual organs—departments like operations or IT—are vital, but without the nervous system coordinating them, the body can't function properly.

VCO is all about getting the most profit across all parts of your business rather than just cutting costs in individual departments. When all functions work together toward the shared goal of profitability, the results are more impactful than when each department goes it alone. To make it work, you need three things: clear data sharing, updated decision criteria that focus on the whole company's goals and a structure that gives people the authority to make decisions across functions.

VCO unifies operations, but AI future-proofs and accelerates it. By crunching vast sets of data, AI helps you keep up with the fast-paced markets so that you can make the decisions today and tomorrow.

AI ups the ante on VCO

Most AI projects fail. MIT's Networked AI Agents in Decentralized Architecture (NANDA) claimed that [95 percent of AI](#) initiatives haven't created any value. This is happening because businesses are stuck in proof-of-concept purgatory and struggle to scale AI.

Solutions like [Sapient Slingshot](#), a platform built to accelerate software development,, can help, as can [tools like generative AI](#), which can pull from shared data pools to generate quick insights. AI can provide a real breakthrough in implementing VCO. But AI's value isn't in building—it's in deciding.

AI's real superpower is its ability to turn raw data into insights you can act on. Typically, linear programs and machine learning crunch numbers to help you make informed decisions. Generative AI can speed up this process by summarizing the important takeaways. By analyzing contracts to summarize them, identify hidden opportunities or prioritize information, for example, it ingests critical data and gives outputs that cut through the noise, making it easier for you to act.



“Take an energy supply and trading firm, for instance. The quicker you’re able to get data from your wind farm over to your trading desk to then make a decision on what to do with it, and then communicate that back to the wind farm is what’s going to differentiate you from competitors.”

Andrew McMillan
Senior Product Manager

If the weather is favorable, the wind farm might produce excess electricity. An AI system predicts an output surge; this data instantly goes to the company's trading desk, where AI analyzes current electricity market prices. Seeing that prices are high, the trading desk decides to sell the anticipated excess power on the spot.

That's just one example. AI-powered decisions across the value chain enables you to adjust refinery configurations to produce more profitable products based on real-time market prices. Alternatively, you can make pre-investment decisions for large projects or decide when to schedule asset maintenance based on the weather.

You can start optimizing your supply chain today

Here's what leaders should do now:

- 1. Audit and upgrade your data infrastructure:** Poor data management is costly, making organizations flush **\$12.9 million** down the drain. Ensure that your energy production and consumption data is accurate, timely, granular and easily accessible in shared dashboards visible to every team.
- 2. Break functional silos with integrated dashboards and teams:** This involves connecting data from distributed assets with IT systems for real-time analysis, fundamentally shifting organizational structures to make the whole system run smoothly.
- 3. Modernize energy supply and trading for agile decision-making:** Don't let outdated trading systems slow you down. Use AI to modernize your systems, turning them into a real-time intelligence hub that helps you make faster, smarter trading decisions.
- 4. Put people at the center of your transformation:** Train your talent through upskilling programs and opportunities. Start small with AI projects focused on areas like predictive maintenance or demand forecasting to demonstrate their value.

By 2026, the companies that win won't be the ones that own the most assets or the smartest AI. They'll be the ones that decide first—and decide right.

Contributors: Alok Lakhchaura (GVP Technology, Delivery, Engineering), Masud Haq (Senior Vice President, Sales & Leadership, Industry Sales), Boris Leshchinskiy (Associate Managing, Director, Delivery, Strategy), Andrew McMillan (Senior Product Manager, Delivery, Product) Sidd Venkatesan (Senior Client Partner, Sales & Leadership, Industry Sales)

End of article

Keep reading: Fractured Audiences Push Telecommunications and Media to Redefine Reach —————>

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.

Special Thanks to:

Abhishek Kumar (Senior Director, Data Science), Alok Lakhchaura (GVP, Technology), Alyssa Altman (Consumer Products, Retail, Transportation & Mobility Industry Lead, NA), Amin Rafinejad (Senior Client Partner), Andre Pierre-Engberts (VP, Technology), Andy McMillan (Senior Product Manager), Anne Phelan (VP Product Management, International Product Lead Retail & Consumer Products, EMEA Product Management Lead) Arjun Dutta (Senior Client Partner, Travel & Hospitality), Ashish Bhadauria (Senior Principal, Strategy & Management Consulting), Audrey Zong (Senior Principal), Boris Leshchinskiy (Associate Managing Director), Bragadish Natarajan (Senior Director, Product Management), Brian Clarey (VP, Managing Partner), Courtney Trudeau (Managing Director, Delivery & Strategy), Dan Pitchenik (Financial Services Industry Lead, NA), Dave Murphy (Financial Services Industry Lead, EMEA & APAC), Emanuel Krantz (CX & Innovation Lead, Consumer Products, EMEA & APAC), Erin Doyle (Director, CX & Innovation Consulting), Gene Bornac (SVP, Management Consulting, Retail), Grace Ge (Senior Principal, Strategy & Management Consulting), Guy Elliott (Consumer Products, Retail, Telco, Media & Tech Industry Lead, EMEA & APAC), Helen Merriott (Consumer Products Industry Lead, EMEA & APAC), Houda Kamoun (Associate Managing Director, Strategy), J.F. Grossen (Global VP of Customer Experience), Jackie Walker (Retail Experience Strategy Lead, NA), Jagdish Ganshani (SVP & Managing Partner, Travel & Hospitality), Jean-Pascal Mathieu (Senior Director, Customer Experience Innovation Consulting), Jennifer Kilian (Chief Experience Officer), Jochen Funk (Automotive and Strategy Lead, DACH), Julian Skelly (Retail Industry Lead, EMEA & APAC), Kristina DeClark (Principal, Strategy & Management Consulting), Lucy Ziegler (Senior Director, Customer Experience Innovation Consulting), Mani Thomas (Associate Director, Digital Product Management), Masud Haq (Senior Vice President), Melissa Trepinski (Managing Director), Milena Šošić (Senior Data Scientist), Mukundhan Sundaram (Senior Director, Technology), Nick Shay (Head of Travel & Hospitality, International), Peter Szczerba (VP Data Strategy, NA Retail Data Lead), Raj Shah (Telco, Media & Tech Industry Lead, NA), Rajeev Singh (Transportation & Mobility Industry Leader, EMEA & APAC), Raymond Velez (EVP & Chief Technology Officer for Customer Data Solutions), Rizwan Devji (Senior Account Director), R. J. Jain (Senior Product Manager), Ronnie Mitra (Senior Director, Technology), Russell Van Gorp (Managing Director of Health Strategy), Saba Arab (Managing Director), Sarita Ghosh (Manager, Data Science), Satyendra Pal (GVP, Global Omni Fulfillment Practice Lead), Selina Park (Manager, Data Science), Shiladitya Ghosh (Senior Director, Client Executive, Travel & Hospitality) Sidd Venkatesan (Senior Client Partner), Simon James (International Lead, GVP, Data Science & AI), Soulaf Khalifeh (Manager, Customer Experience & Innovation Consulting), Sudip Mazumder (Retail & B2B Industry Lead, NA), Teague Lenahan (Managing Partner & Group VP, Travel & Hospitality), Tim Lawless (Health Industry Lead, NA), Toby Boudreaux (Global VP, Data Engineering), Vaibhav Sanjiv Patil (Senior Associate, Data Science), Vinci Rufus (VP, Technology, XE Craft Lead), Vlad Panov (VP, Engineering), Xavier Cimino (Senior Managing Director, Strategy), Zachary Paradis (Global GVP, CX & Innovation Consulting, NA).



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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