CX HORIZONS:
THE STATE OF CX IN 2026

CX NETWORK

RESEARCH REPORT

The trends, challenges, spending plans, and customer behaviors driving CX in 2026 and beyond

INSIDE

- The factors elevating the importance of customer privacy and data security
- How to grow your customer base and drive more sales in an AI-powered trading environment
- Why discoverability is changing and how to harness AEO and GEO

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CX Network Experts

Our interviewees are CX professionals in major organizations. Their analysis in this report draws on their experience at their current organizations and others.

Nao Anthony
Senior manager of operational excellence
**Commonwealth Bank, and a
CX Network Advisory Board member**

Babul Balakrishnan
Senior vice president of customer experience
Thunes
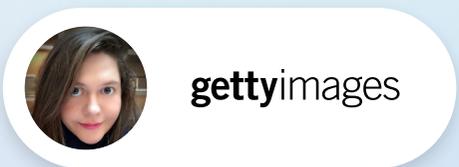
Jacqueline Bourke
Senior director of creative for the EMEA region
Getty Images

Joshua Curtis
Customer care center manager
**Super Retail Group, and a
CX Network Advisory Board member**

Sue Duris
Principal consultant
M4 Communications

Ebrahim Hyder
VP of customer care
**Michael Kors, and a
CX Network Advisory Board member**
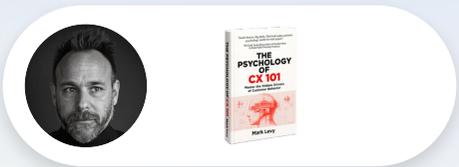
Mark Levy
Author
**The Psychology of CX 101, and a
CX Network Advisory Board member**

Dianna Lyngholm
Director of creative services
Fun.com

Ekaterina Mamonova
Global head of broker proposition
Liberty Specialty Markets

Montserrat Padierna
Customer knowledge and experience lead
**Walmart Canada, and a
CX Network Advisory Board member**

Greg Thomas
Senior Director of Thought Leadership
Genesys

Jaslyin Qiyu
CMO and head of CX for Singapore and Australia
**Cigna Healthcare, and a
CX Network Advisory Board member**

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Foreword

Shaped by new technologies, new customer behavior, and age-old challenges, CX has changed drastically since the start of this decade. However, the last 12 months have seen external forces – from Big Tech to regional regulators – start to reshape what CX means and what it is capable of, accelerating change and forcing new ways of working.

From agentic commerce to new regulations around AI use and governance, these forces are changing brand visibility, customer relationships, loyalty, customer journeys, and service. They have fundamentally shifted the balance of power between consumers and brands, and they're placing new responsibility on CX leaders to ensure their organizations are agile enough to seize on new opportunities while being resilient enough to survive change.

Taken together, these developments point to a seminal year ahead for CX.

With commentary and analysis from 12 CX leaders from the worlds of fashion, media, consultancy, healthcare, retail and ecommerce, finance, communications, and technology, *CX Horizons: The state of CX in 2026,* presents and analyzes what's happening to the trends, challenges, investment priorities, strategic aims, and customer behaviors that drive the work of CX practitioners.

The findings in this report are taken from our annual survey, completed by our network members between December 2025 and January 2026. This year, the survey was completed by 342 CX practitioners, service leaders, experience designers, analysts,

authors, and consultants from around the world. With the response data as a guide, this report establishes what is happening in CX in 2026 and explains how best organizations can adapt, invest, and strategize now and in future.

CX Horizons: The state of CX in 2026

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About the respondents

To contextualize the findings cited in *CX Horizons: The State of CX in 2026*, this section details the locations, departments, seniority and job function of the survey respondents. Please note that due to rounding, some figures may not total 100 percent.

Figure 1
I am...

91%

A customer experience, service, insight, digital, data, AI or marketing practitioner

9%

An industry analyst, researcher, commentator, author/blogger
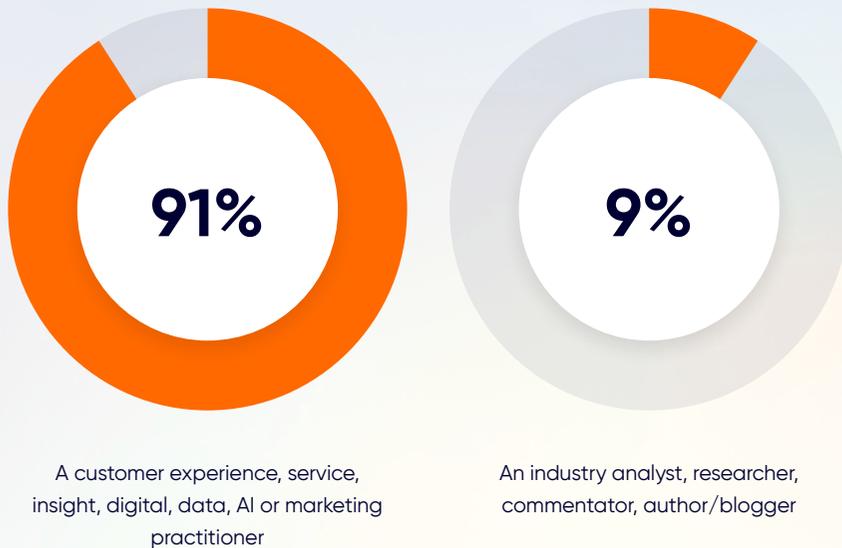
Figure 2
Which title best describes your current role?
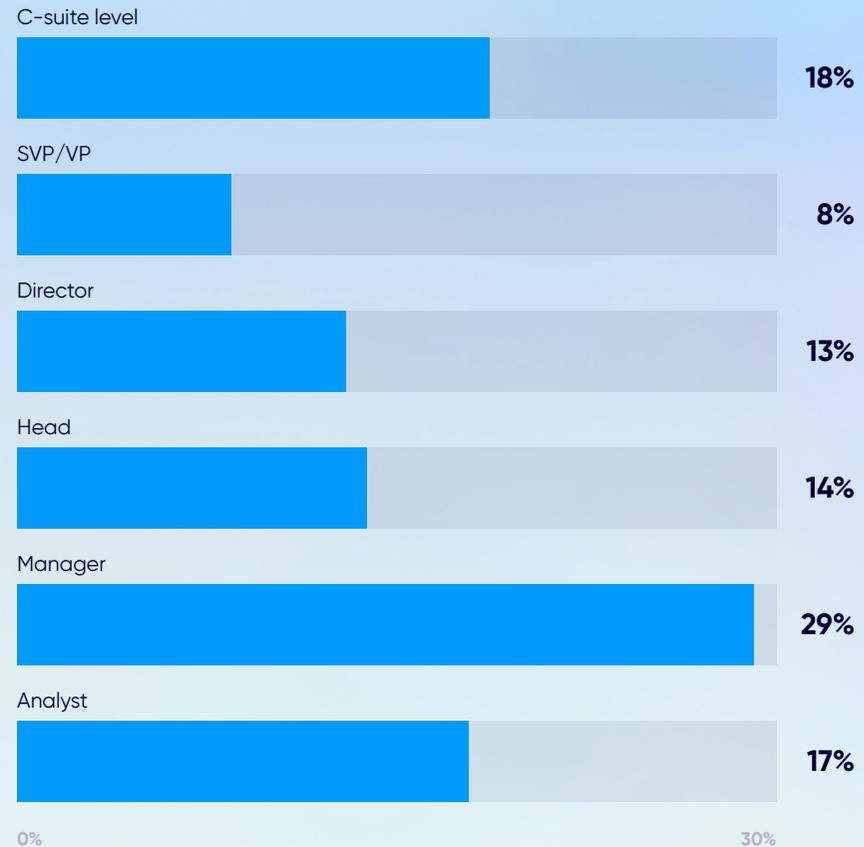
Role	Percent
C-suite level	18%
SVP/VP	8%
Director	13%
Head	14%
Manager	29%
Analyst	17%

0% — 30%

Source: *CX Horizons: The State of CX in 2026 survey, completed by 342 network members between December 2025 and January 2026.*

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Figure 3

In which functions/ departments do you sit?

- ● Artificial Intelligence (AI)
- ● Contact center/Customer service
- ● CRM
- ● Complaint management
- ● Customer experience (CX)
- ● Digital transformation
- ● Data insights and analytics
- ● Executive team/ C-suite
- ● IT, tech
- ● Marketing and market research
- ● Operations
- ● Product management
- ● I sit across multiple departments

4% 17% 2% 1% 29% 2% 3% 6% 5% 7% 10% 4% 13%

30%

0%

Source: *CX Horizons: The State of CX in 2026 survey, completed by 342 network members between December 2025 and January 2026.*

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About the respondents

Figure 4

In which industry do you operate?

2% Automotive	**17%** Banking, financial services, insurance	**10%** Healthcare
9% IT and tech	**2%** Outsourcing/ professional services	

- **2%** Automotive
- **17%** Banking, financial services, insurance
- **10%** Healthcare
- **9%** IT and tech
- **2%** Outsourcing/ professional services
- **5%** Telecoms/ Wifi / mobile/ broadband
- **3%** Education
- **3%** Fintech
- **8%** Retail/ ecommerce
- **6%** Travel/ hospitality
- **8%** Government/ public sector
- **2%** Media/ publishing/ entertainment
- **4%** Industrial and manufacturing
- **2%** Utilities (energy and water)
- **2%** Fast Moving Consumer Goods (FMCG)
- **2%** Electronic goods
- **5%** Logistics and transport
- **6%** Other / multiple/ unidentified

Source: *CX Horizons: The State of CX in 2026 survey, completed by 342 network members between December 2025 and January 2026.*

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About the respondents

Figure 5

Which geographic region are your responsibilities focused on?

North America

Europe /UK&I

17%

3%

33%

Global

8%

MEA

3%

36%

Central and South America

Asia-Pacific

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THE TRENDS SHAPING CX TO 2030

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- **IN NUMBERS: The trends shaping CX**
- **CX has new foundations**
- **The five pillars of AI implementation**
- **The new rules of discoverability**
- **What these trends say about CX in 2026**

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The trends shaping CX to 2030

We asked our network members to select three trends they expect to change their work to 2030, from a list of more than 25 choices. The graphic below shows the 10 most selected responses in 2026, with a comparison of the top responses in 2025 and 2024.

Figure 6

The trends shaping CX

2026 top 10 trends	2025 top 10 trends	2024 top 10 trends
AI-powered technologies for operations	AI-powered technologies for operations	Data and analytics
Agentic AI and AI agents	Generative AI chatbots and virtual assistants	AI-powered technologies for operations
AI-first customer journeys/ customers using AI for product research	Customer loyalty and retention (Tied second place)	Automation
Conversational AI chatbots and virtual assistants	Automation (fourth place overall)	Customer loyalty and retention
Automation	Conversational AI chatbots and virtual assistants	Generative AI chatbots and virtual assistants
Generative AI chatbots	Generative AI for marketing/ hyper-personalization	Conversational AI chatbots and virtual assistants
Customer loyalty and retention	Data analytics and utilization	Digital CX
Generative AI for marketing/ hyper-personalization	Employee experience	Employee experience
Data analytics and utilization	Digital CX	Generative AI for marketing/ hyper-personalization
Consumer privacy	Self-service	Self-service

"Get the foundations right before you deploy, or your AI investment becomes a trust liability."
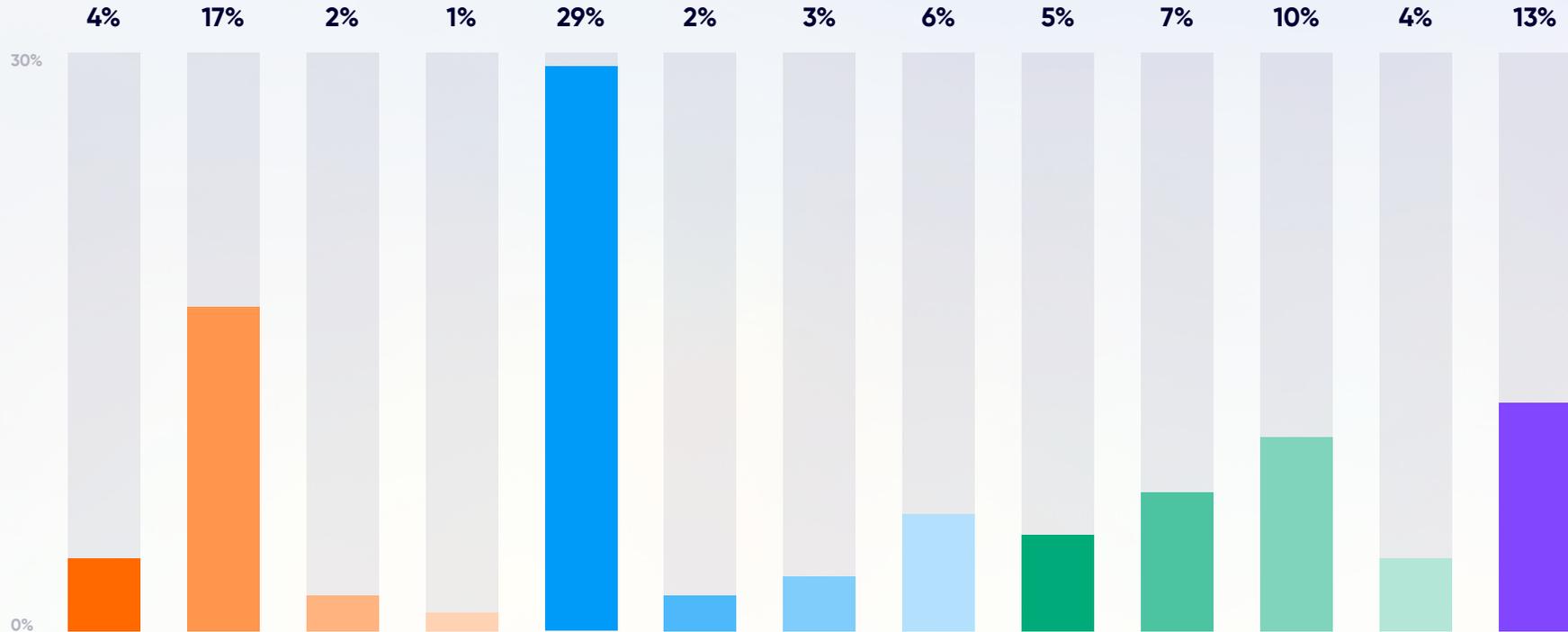
Sue Duris, principal consultant at M4 Communications

Source: *CX Horizons: The State of CX in 2026 survey, completed by 342 network members between December 2025 and January 2026. In 2025, 353 practitioners responded and in 2024, 282 practitioners responded. For this question, respondents are always asked to select three choices.*

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CX has new foundations

Our 2025 research into the state of CX demonstrated for the first time that AI was firmly embedded in the modern organization and had become crucial for delivering CX at scale. In 2026, that trend only continued.

As demonstrated by Figure 6, in recent years the foundations of modern CX – such as personalization, self-service, and digital experiences – have changed, giving way to cutting-edge technologies that deliver state of the art capabilities for organizations and enhance CX both directly and indirectly.

We asked survey respondents to select the three trends having the greatest impact on their work from a list of more than 25 choices. For the second consecutive year the most selected response was AI-powered technologies for operations. Selected by 24 percent of respondents, its ranking as the top trend confirms the broad role AI plays in everything from data analysis to customer service. It was followed by agentic AI and AI agents (21 percent), and AI-first customer journeys/ customers using AI for product research (17 percent); two new developments which, 15 months ago, were not on the practitioner's radar. Crucially, these developments are changing CX from the outside. Co-pilots are becoming commonplace in service suites and in general use corporate IT, powering efficiencies and supporting a range of

back-end tasks. Meanwhile, agentic commerce – as enabled by various LLMs and Google's suite of dedicated tools – is on track to shift customer relationships toward third-parties and away from the online retailers who traditionally owned them.

This year's data also confirmed that consumer privacy is becoming more influential to the work of practitioners, entering the top 10 for the first time. This is not unrelated to the prominence of AI and data-dependent technologies that comprise the rest of the

top 10. However, perhaps the most surprising result was seeing data analytics and utilization drop to 10th most important trend, only two years after holding the top spot.

Automation once again held its place as a trend of substantial but not critical importance, and both generative and conversational AI bots remained highly influential, while generative AI for marketing and hyper-personalization dropped slightly in importance to make way for its agentic cousins.

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The five pillars of AI implementation

Identifying a trend is only part of the story – the ability to act on it is what sets organizations apart. Sue Duris, principal consultant at M4 Communications, says AI implementation requires five "foundational pillars" before deployment (see page 13), which cover defining the problem AI is intended to solve, assessing team capability and current data, building trust before deployment, and derisking through "disciplined pilots".

Sharing a "critical reminder", she explains: "AI should enhance human judgment, not replace it. Use Voice of Customer (VoC) insights to guide AI, but don't let AI override human context. Audit algorithms regularly to prevent unintended biases. The foundation isn't just technical – it's strategic clarity, plus organizational readiness, plus ethical guardrails. Get the foundations right before you deploy, or your AI investment becomes a trust liability."

The influence of AI reaches much further than the six trends it drives. According to Joshua Curtis, customer care center manager at Super Retail Group, the emergence of consumer privacy as a top 10 trend has been accelerated by AI.

"In my experience, privacy has generally lived with legal or risk teams. CX teams were impacted by it, but not directly responsible for how it showed up in the customer experience," he says. "Today, privacy decisions are being made inside customer experience platforms, workflows, and journeys often without a human involved. That brings the issue much closer to the front line."

"Privacy has moved from being a policy discussion to an experience one, and that's why it's now firmly on the CX agenda."

Joshua Curtis, CX Network Advisory Board member and customer care center manager at Super Retail Group

Customers are also far more aware of their data – and how it powers AI – than they were even a few years ago, Curtis adds. "They notice when something doesn't feel right. An unexpected call, a message that feels overly personalized, or being asked to repeat information they thought the brand already had. When that happens, customers don't escalate to 'compliance' They contact customer service," he adds.

With automated and AI-assisted decision making, the volume of customer data being utilized, shared and interpreted increases significantly. Curtis says: "That forces us as leaders to ask more practical questions: what data do we actually need to resolve this issue, where is it coming from, and how confident are we in how it is being used?"

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The five pillars of AI implementation

Poor handling of data doesn't just create reputational risk, he adds, it creates avoidable contacts, rework, and cost. The trust element also applies here. "Customers are becoming less tolerant of friction and less forgiving when brands get it wrong," Curtis explains.

In short, Curtis says: "Privacy has moved from being a policy discussion to an experience one, and that's why it's now firmly on the CX agenda."
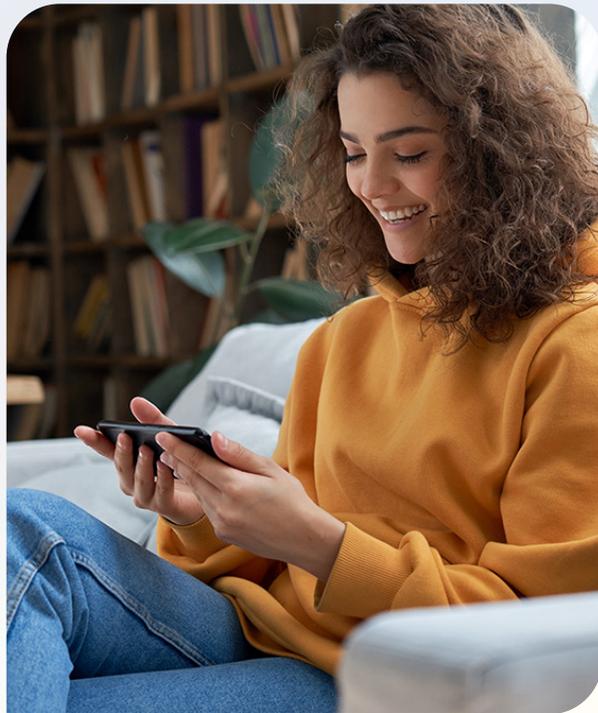
The five pillars of AI implementation

1 Strategic clarity
Define the specific business problem or customer need driving implementation, identify clear use cases with measurable outcomes, and ensure AI serves your CX strategy – not the other way around.

2 Organizational readiness
Identify upskilling needs and expertise gaps. Ensure infrastructure and governance frameworks exist. Critically, involve employees from the beginning – AI implementations that exclude frontline input or ignore adoption concerns fail regardless of technical excellence. Build change management into deployment from day one.

3 Data foundation
Assess the current state of your data: Is your data clean, structured, and accessible? How will it interact with learning models? Build processes to ensure diversity and prevent bias in training data, and establish quality assurance mechanisms.

4 Customer trust and transparency
Communicate AI use clearly and proactively to build trust before you deploy. Define ethical boundaries – is personalization helpful or invasive? Establish when automation hands off to human intervention. Use behavioral prediction to serve customers, not manipulate them. Balance compliance requirements with innovation.

5 Risk mitigation and iteration
Start with controlled use cases, define success metrics upfront, and monitor in real-time with reversion plans ready. De-risk through disciplined pilots, then iterate and improve before scaling organization-wide.

Source: *Sue Duris, principal consultant, M4 Communications*

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The new rules of discoverability

For the first time this year the question on top CX trends included a new response choice: AI-first customer journeys/ customers using AI for product research. This was included in response to the ongoing development of shopping capabilities in LLMs and AI assistants, and Google's agentic commerce suite launch. Demonstrating the seismic shift this technology will bring to the world of retail and ecommerce, this response emerged as the third most important trend influencing the work of practitioners at present. Discoverability is no longer rooted in traditional advertising, marketing, and SEO, but GEO (generative engine optimization) and AEO (answer engine optimization, see Challenges & Aims section). This calls for site-wide transformation and optimization. Curtis says that as a result of these developments discoverability will change in "a pretty fundamental way".

"It's no longer just about how well you rank in search or how strong your marketing is, it's about how well your business actually holds together when an AI is assessing it on a customer's behalf," he explains. "As customers start using tools like ChatGPT or agentic commerce platforms to research, compare, or even transact, those tools aren't just looking at brand or price. They're picking up on things like delivery reliability, how easy returns are, customer sentiment, and how often customers need to contact you to fix something.

In effect, AI starts judging brands on operational reality, not just brand promise. That's a big shift," he adds.

The end result is that discoverability could become tightly linked to service, fulfilment, and post-purchase experience. "If delivery timeframes aren't reliable, policies are hard to interpret, or customers regularly need help to resolve issues, AI will learn that quickly and steer customers elsewhere," Curtis explains. "From a CX point of view, it really lifts the importance of getting the basics right at scale. Clean data, clear policies, and consistent experiences across channels stop being hygiene factors and start becoming growth drivers," he says.

However, from the customer point of view, Dianna Lyngholm, director of creative services at Fun.com, believes the current conversational format will make way to even more advanced experiences on a retailer's website. The nature of LLM interactions is reminiscent of pre-omnichannel CX, when customers had to reintroduce themselves and their queries each time they switched channels. In a similar way, she says customer patience for repeated "cold starts" with on-site buying agents will soon wear thin.

"The next step is vector AI," she says. This approach leverages vector databases to convert and utilize unstructured customer data, such as previous chat
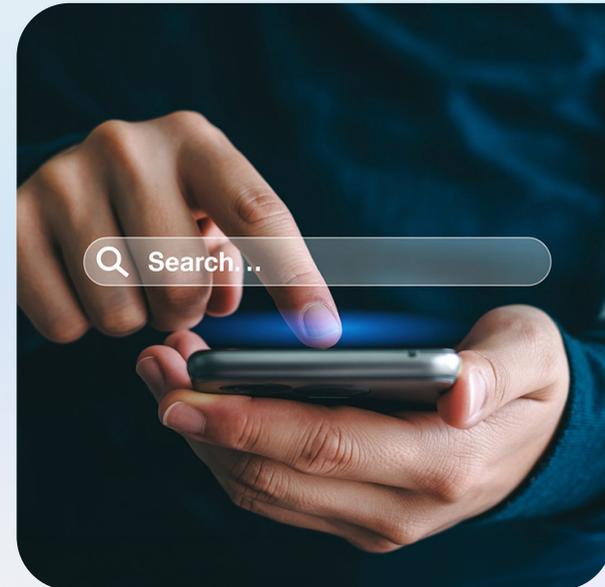
logs, to create real-time semantic searches that are contextually relevant and, as a result, hyper-personalized as standard. The result is proactive, AI-driven customer experiences and service.

"Agentic AI may require 15 questions to finally get a customer to where they want to be, but vector AI solves the cold start issue. Instead of having to answer a series of questions when the customer is on a website, they start clicking and searching and everything gets personalized in real time, with zero latency. That's really the way it's going to go but I'm seeing very few people do this so far," she explains.

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What these trends say about CX in 2026

Reflecting on the top CX trends, Greg Thomas, senior director of thought leadership for Genesys, says CX has "truly entered the AI Era" and that AI is no longer a feature, but is "becoming the operating model", enabling a shift from "managing CX purely with operational efficiency in mind to a world where CX leaders can also prioritize building customer loyalty".

"Customers increasingly judge organizations based on the best experience they've had with any brand, anywhere. AI-powered orchestration allows for efficient, empathetic, and emotionally intelligent experiences from the customer's point of view. AI enables brands to identify intent signals early, personalize engagement in real time, and turn service moments into relationship-building opportunities," Thomas explains.

It isn't just loyalty that is being reshaped. Thomas says the economics of CX are also changing, and that the importance of data in powering AI is putting "newfound importance on strategic CX platforms" – and the ability to prove ROI. He adds: "Leaders are also under pressure to move beyond AI proofs of concept to proving ROI and delivering business value at scale. And AI is both enabling this shift and providing a greater ability to measure the experiences that are being delivered."

"Together, these trends signal a new mandate: CX must function as an AI-driven orchestration layer that balances autonomy, loyalty, and operational discipline," Thomas says. "The winners in 2026 aren't just deploying AI. They're doing it thoughtfully, with clear guardrails that protect safety, and in ways that balance efficiency and loyalty."

"Together, these trends signal a new mandate: CX must function as an AI-driven orchestration layer that balances autonomy, loyalty, and operational discipline."

Greg Thomas, senior director of thought leadership for Genesys

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- **Practitioners are investing to leverage the latest trends**
- **Spending on AI and digital CX set to rise**
- **Working with third party solution providers**
- **IN NUMBERS: The top 5 investment obstacles**

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Annual budgets for CX management solutions

We asked our network members to confidentially disclose which bracket their CX budget for 2026 falls into. This question was answered by 255 of the total respondents, due to some respondents not having visibility into this information. To demonstrate how CX budgets have changed over the last five years, this graphic includes the responses to this question for each year since 2022.

Figure 9

Annual budgets for CX management solutions

Budget bracket (US$)	2026	2025	2024	2023	2022
US$0–$100,000	25%	33%	43%	22%	34%
$100,000–$250,000	15%	19%	17%	20%	19%
$250,000–$500,000	15%	16%	9%	12%	10%
$500,000–$1m	15%	13%	13%	16%	9%
$1m–$2.5m	11%	8%	8%	12%	9%
$2.5m–$5m	7%	4%	4%	8%	19%
$5m–$10m	3%	2.5%	4%	7%	N/A
$10m+	8%	5%	3%	3%	N/A

Source: CX Network CX Horizons Survey, December 2025-January 2026/ in 2026 this question was answered by 255 respondents

"What's missing from most investment plans is the uncomfortable part. AI and automation will fail without equal investment in skills, adoption, and operating model redesign."

Babul Balakrishnan, senior vice president of customer experience for Thunes

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How practitioners plan to invest their CX budget

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We also asked our members to select three areas in which they plan to invest their CX budget in 2026. This graphic shows the most selected responses.

Figure 10

How practitioners plan to invest their CX budget
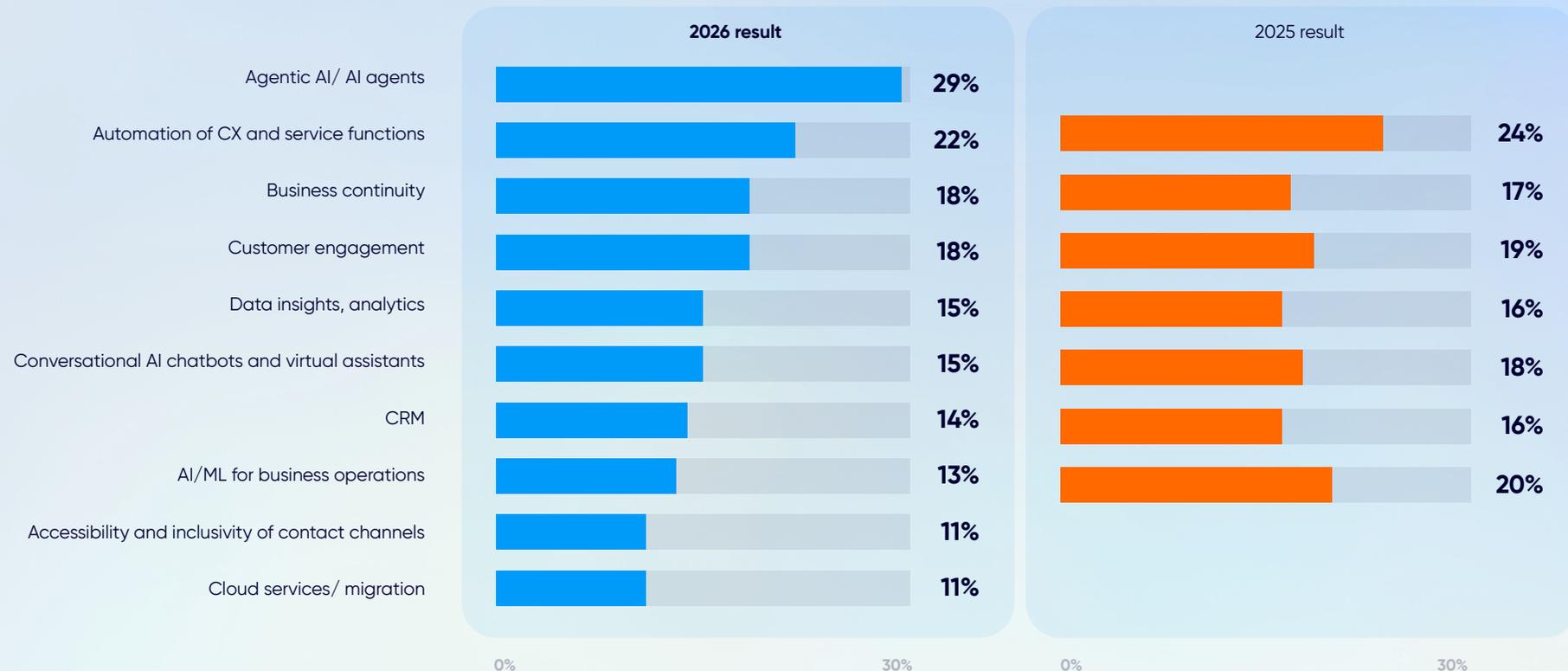
	2026 result	2025 result
Agentic AI/ AI agents	29%	
Automation of CX and service functions	22%	24%
Business continuity	18%	17%
Customer engagement	18%	19%
Data insights, analytics	15%	16%
Conversational AI chatbots and virtual assistants	15%	18%
CRM	14%	16%
AI/ML for business operations	13%	20%
Accessibility and inclusivity of contact channels	11%	
Cloud services/ migration	11%	

Source: *CX Horizons: The State of CX in 2026 survey, completed by 342 network members between December 2025 and January 2026.*

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Practitioners are investing to leverage the latest trends

For the fifth consecutive year, the largest share of respondents selected the lowest budget bracket, with 25 percent disclosing their CX budget is US$100,000 or less. However, as demonstrated in Figure 9, there is also a slight year-on-year increase in the number of respondents who have $10 million or more to spend on CX.

Among respondents, 39 percent said they expected their 2026 budget to be higher than the previous year, while 13 percent said they expected it to be lower, and 32 percent expect it to be the same.

In line with the results in the Trends section, Figure 10 confirms practitioners plan to invest in cutting edge technologies that will support them to embrace the latest trends, achieve their strategic goals, and mitigate the impact of their challenges. The top areas for investment this year emerged as agentic AI and AI agents (29 percent, see Figure 10), followed by automation of CX and service functions (22 percent), and business continuity (18 percent), which re-entered the top 10 in 2025 for the first time since the Covid-19 pandemic. Contact center solutions and VoC tools did not make the top 10 most selected responses this year, despite ranking in eighth and tenth place respectively in 2025.

On how practitioners can make long-term investments that will prepare their organizations for what's on the horizon, Babul Balakrishnan, senior vice president of customer experience for Thunes says automation should be prioritized, not because it's a top trend, but because "scale has finally caught up with us". He explains: "Manual workarounds, top agents, and 'we'll fix it later' processes or methodologies no longer survive volume, complexity, or customer expectations. Automation isn't and shouldn't be about replacing humans; it's about removing friction so humans can show up where judgment and empathy actually matter."

However, he adds: "What's missing from most investment plans is the uncomfortable part. AI and automation will fail without equal investment in skills, adoption, and operating model redesign. This is the silent gap in many CX budgets. Tools move faster than organizations. Change management is critical."

The rise of business continuity and operational resilience is also notable. Business continuity entered the top 10 investment priorities in 2025 for the first time since the Covid-19 pandemic, most likely due to the huge dependence on global interconnected systems, and the rise in outages and cyber attacks. "Customers today don't differentiate between unexpected outages and poor service, they just experience failure," Balakrishnan says. "Delays, broken handoffs, and downtime erode trust far faster than a slow response ever did. Resilience has become a CX promise."

Finally, when it comes to investing in data, analytics, and decision intelligence (as 15 percent of respondents plan to), there is a "subtle but important" shift. Balakrishnan says: "We don't need more dashboards. We need better decisions in the moment, guidance that helps agents, systems, and leaders know what to do next, not just what went wrong last week. CX also needs data governance and structure. Without clean, trusted, well-connected data, every AI or automation ambition eventually stalls."

> "When evaluating new CX technology, especially AI solutions, the most important advice is to take your time, do your research, and avoid being swayed by hype or urgency."
>
> **Ebrahim Hyder VP of customer care for Michael Kors**

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Spending on AI and digital CX set to rise

When we asked practitioners how their spending across 13 top CX categories Is likely to change in 2026, it became clear that spending on AI is set to rise across the board, while areas such as CXM platforms, complaint resolution, and contact center solutions will see spending stagnate year-on-year.

As many as 46 percent of respondents said they expect their spending on generative AI to increase this year (compared with eight percent who expect it to decrease), while 40 percent said they expect spending agentic AI and AI agents to increase (11 percent expect a decrease), 32 percent said they expect spending on AI regulatory compliance to increase (nine percent expect a decrease), and 39 percent expect to spend more on other AI projects for CX and service (11 percent expect a decrease).

Another area on track to see a spending boost is digital CX. Despite no longer making the list of top 10 trends, as many as 41 percent of practitioners said they expect spending on digital CX to increase in 2026.

Areas where investments are unlikely to increase include team recruitment/ retention, with 40 percent of practitioners saying they expect spending to remain the same as last year, complaint resolution (39 percent will invest the same as last year), and CXM platforms (38 percent will invest the same as last year). As many

as 33 percent of respondents said they expect their spending on contact center solutions to be the same this year as last.

Working with third party solution providers

The next key consideration when investing in CX capabilities is selecting partners who can support and deliver on strategic aims.

Offering his advice on how practitioners can effectively expand their partner ecosystem, Ebrahim Hyder, VP of customer care for Michael Kors, says: "When evaluating new CX technology, especially AI solutions, the most important advice is to take your time, do your research, and avoid being swayed by hype or urgency.

"The AI landscape in CX has expanded at an unprecedented pace, creating a crowded market where many vendors showcase similar agent-facing capabilities, such as summarized case notes, call transcription, and generative email replies. They are largely differentiated by marketing language rather than true technical depth," he explains.

Agentic AI voice and chatbots that can resolve low- to medium-complexity tasks such as FAQs, order tracking, and returns represent "a major opportunity, but execution and maturity vary widely across providers".

This means one of the most effective ways to assess a vendor's readiness is to insist on two types of demos: a customized demo tailored to your brand's tone, policies, and top use cases; and a live demo with an existing customer using the solution in real production scenarios. "This dual-demo approach helps you distinguish between polished sales demos and real-world performance, especially important in such an emerging and fast-moving category," Hyder says.

Pricing is another critical area where CX leaders must proceed carefully. "Because the AI market is still maturing, pricing models differ drastically even for similar capabilities," he says. "During my own agentic AI research, I encountered structures ranging from per-minute billing with added fees when the agentic bot resolves an inquiry, to flat per-resolution pricing, to mandatory annual minimum commitments tied to projected usage. Understanding how each model scales as adoption grows is essential to avoiding surprises," he says.

Finally, Hyder says practitioners should ask vendors to clearly outline what services are included in their partnership, such as the creation of new automations or use cases, LLM tuning and updates, QA processes, model maintenance, monitoring, and ongoing optimization. "Successful AI implementation depends not just on the technology itself, but on the strength and reliability of the operational partnership that supports it," he explains.

The top 5 investment obstacles

Next, we asked respondents to select three obstacles they expect to encounter when investing in CX this year. This graphic shows the five most selected responses from a list of 15 choices.

Figure 11

The top 5 investment obstacles

Demonstrating ROI
35%

Finding budget
32%

Integration with existing tools
26%

Economic conditions in local/regional market
23%

Complicated internal sign-off process
23%

0%   50%

Source: *CX Network CX Horizons Survey, December 2025-Jan 2026/ Respondents were asked to select three choices.*

Demonstrating ROI is a barrier to investment

Among the top five most significant investment obstacles, demonstrating ROI, finding budget, and integration with existing tools remain the top concerns for the third consecutive year. Although still a top five response, concerns about economic conditions in local and regional markets emerged as less of a concern in 2026.

Elsewhere in the survey, 52 percent of practitioners told us the pressure to prove ROI is increasing, while 36 percent reported that it has stayed the same, and only three percent said it has decreased.

On how to overcome the challenge Montserrat Padierna, customer knowledge and experience lead for Walmart Canada, says: "ROI becomes clearer when intelligence does not stop at analysis, it closes the loop." And closing the loop requires two disciplines:

1 Insights must translate into action:

"When friction points are tied to measurable outcomes, like, churn reduction, cost-to-serve improvement, recovery effectiveness or revenue protection the financial impact becomes visible," Padierna says. "Experience degradation can be framed as economic risk, and experience improvement as margin protection," she adds.

2 The business must continuously tune and govern the system:

AI outputs are only as strong as the context behind them. "This is where experienced practitioners play a critical role," Padierna says. "Leaders with tenure and cross-functional understanding ensure prompts are refined, outputs are interpreted correctly and guardrails remain intact."

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THE AGE OF HIGH-TECH CX

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- IN NUMBERS: How generative and agentic AI are changing CX and applying generative AI to a typical customer journey
- Digital CX needs intelligence, empathy, and effortless design
- AI demands new skills and processes
- Generative AI can multiply efficiencies but should be used with caution
- The outlook for generative and agentic AI in CX

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How generative and agentic AI are changing CX

Figure 12

How generative and agentic AI are changing CX

Enable more hyper-personalization for customers
27%

Bring a requirement for teams to upskill
36%

Pave the way for digital employees working alongside humans
32%

Demand new operating systems and back-end processes
30%

Facilitate AI-first customer journeys
25%

Remap journeys for AI customers/ machine customers
24%

Automate complaint resolution
27%

Place a greater focus on revenue and retention as the core CX metrics
23%

Demand for more transparency of how personal data and AI are being utilized
21%

0%   50%

Source: *CX Network CX Horizons Survey, December 2025-January 2026*

We asked practitioners to tell us how they believe generative and agentic AI will change their organization's capabilities in and approach toward CX. Respondents could select all responses that applied to their organization.

"Change, strategy, and communication skills have become secondary, while technology capability and entrepreneurial thinking have become crucial."

Nao Anthony, senior manager of operational excellence for Australia's Commonwealth Bank

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Applying generative AI to a typical customer journey

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We asked practitioners where in a typical customer journey generative AI is currently in use and provided five journey-related options to choose from.

"We were able to mobilize generative AI to change the models from male to female and create new listing images for about 150 products in the first month, without requiring any additional bandwidth."

Dianna Lyngholm, director of creative services at Fun.com

Figure 13

Applying generative AI to a typical customer journey
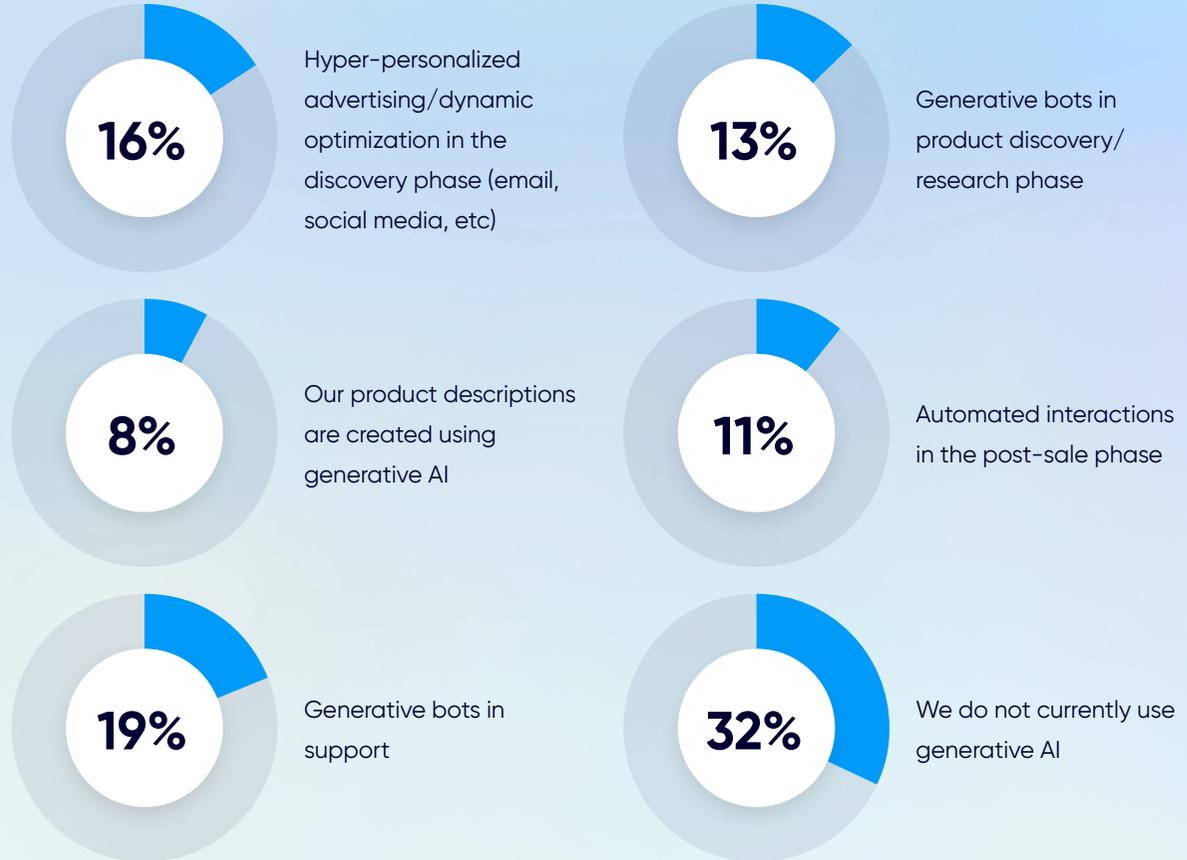
16% Hyper-personalized advertising/dynamic optimization in the discovery phase (email, social media, etc)

13% Generative bots in product discovery/research phase

8% Our product descriptions are created using generative AI

11% Automated interactions in the post-sale phase

19% Generative bots in support

32% We do not currently use generative AI

Source: *CX Network CX Horizons Survey, December 2025–January 2026*

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Digital CX needs intelligence, empathy, and effortless design

Since 2023, digital CX as a trend appears to have become less influential to the role of CX practitioners. In 2023 it ranked as the top trend among respondents, but dropped to seventh most influential trend in 2024, and ninth in 2025. This year, digital CX failed to make the list of top 10 trends, however, the components of digital CX – and the prevalence of digital journeys – are more important than ever. This is reflected in the research results in several ways. As outlined in the Investments section, 41 percent of practitioners expect spending on digital CX to increase this year, and nine percent said they see investments in digital as a means by which to achieve their strategic goals.

"The most powerful digital CX experiences today are those that unite intelligence, empathy, and effortless design, creating journeys that feel seamless, consistent, and human, even when powered by automation," says Hyder. "Loyalty is strengthened when every digital touchpoint reduces customer effort while increasing emotional connection. Today's customers expect brands to anticipate needs, personalize interactions, and deliver outcomes efficiently, regardless of channel."

From a technical perspective, a major pillar is AI-driven personalization, which is now no longer confined to "static rules-based journeys". Hyder says

the new level of contextual awareness "not only accelerates resolution but reinforces that the brand understands and values the customer".

"Equally critical is agent-assist intelligence," he says. "Empowering frontline teams with contextual prompts, autogenerated case summaries, next-best-action guidance, and emotional-sentiment insights helps agents deliver more empathetic and efficient service. As I've often emphasized in industry conversations, elevating the agent experience is inseparable from elevating the customer experience."

Demonstrating the pace at which CX has adopted and innovated with agentic AI, Hyder says agentic AI voice and chat systems are now "foundational components of modern CX ecosystems", deployed to fully resolve routine, low- to medium-complexity tasks in a brand's voice and tone, while seamlessly escalating to a human associate when the interaction calls for nuance, judgment, or empathy.

Loyalty, however, is a different beast. Shaped by transparency, accessibility, and proactive communication, Hyder says predictive notifications, real-time tracking across fulfillment and repair journeys, clear escalation paths, and inclusive design ensure

customers feel informed, capable, and supported throughout their experience. All are essential to the nurture and maintenance of customer relationships.

"By blending intelligence, anticipation, and emotional design, brands create digital journeys that earn not just satisfaction, but long-term loyalty," he adds.

As digital journeys become more widespread, so too does the need for these journeys to be accessible. In recent years both the EU and US have introduced new regulations to make digital customer journeys more accessible – and these apply to all businesses with operations in these jurisdictions. When we asked respondents how they adapted to these changes, 47 percent said they have taken steps to make digital customer journeys more accessible in line with new regulations, while 22 percent said they have not, and 33 percent were unsure.

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AI demands investment in new skills and processes

One year after the arrival of agentic AI and three years since the arrival of generative AI, CX has changed drastically. Organizations are transforming to optimize operations, meet regulatory requirements, and realize the cost savings that can be achieved when these technologies are deployed thoughtfully and strategically.

Much of the responsibility for investing in and governing the use of AI in CX falls directly to CX leaders. Among respondents, 37 percent said they are part of the decision-making team for investing in AI capabilities and 20 percent said they influence decisions, while 15 percent said they take sole responsibility. As many as 68 percent said they acquire new AI capabilities through third-party vendors.

When we asked practitioners to tell us about the changes they believe generative and agentic AI bring to their organization, the most selected response was the requirement for teams to upskill (36 percent, see Figure 12), while 32 percent said it will pave the way for digital employees working alongside humans, and 30 percent said it will demand new operating systems and back-end processes.

"The landscape of capability within leaders and practitioners has exponentially evolved," says Nao Anthony, senior manager of operational excellence for Australia's Commonwealth Bank. "Change, strategy, and communication skills have become secondary, while technology capability and entrepreneurial thinking have become crucial. Developing future skills has increasingly been influenced by the ability to deploy solutions while offering services and capturing requirements all at once. This means one thing: agile operating models and extremely mature agile solution development, enabled by AI."

He says investment in people and skills can "transform the very fabric of how organizations mature quickly to lead, serve, and offer innovative solutions to consumers".

If silos persist, they must also be eliminated. Anthony says: "The consequence of these suboptimal approaches is a significant disconnect between the customer and the organization, ultimately impacting the service experience and the very survival of the business."

Governance is also critical. In 2025, we asked practitioners if they had an organization-wide approach to AI governance for the first time. As many as 48 percent said no, while 37 percent said they do have models in place, and 15 percent were unsure. This year, the results show a marked improvement: 43 percent now do have an organization-wide approach in place, and a much-reduced 20 percent do not, while 11 percent said they were unsure and 12 percent said their policy is department-wide, not org-wide. With the EU AI Act se to come into force in August 2026, organizations are nearing the 11th hour for regulatory compliance. The financial penalty for failure to meet requirements has been set at 30 percent of annual revenue.

Generative AI can multiply efficiencies but should be used with caution

As outlined, early use cases for agentic AI are focused on efficiency gains and its decision-making capabilities are starting to be implemented for outcomes that impact real-world customers. Generative AI, however, is on another level. Whether it's service bots or advertising campaigns, since the technology hit the mainstream in 2022, it has been used widely to generate many types of content that touch every step in the customer journey, from product descriptions, service and post-sales support to advertising and now discovery.

In a typical customer journey, practitioners told us their customers encounter generative AI bots in support, and that generative AI is used to create hyper-personalized advertising/dynamic optimization in the discovery phase (email, social media, etc, see Figure 13). Notably, 32 percent said they do not currently use generative AI.

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Generative AI can multiply efficiencies but should be used with caution

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At online costume retailer Fun.com – and its sister company HalloweenCostumes.com – generative AI is used to execute creative campaigns for product listings that would be impossible to deliver at scale with current resources. Lyngholm says: "We're onboarding so many new products at the same time, when we added new unisex costumes to our catalog we didn't have the bandwidth to re-shoot the costumes with different models, edit the images, et cetera. But we were able to mobilize generative AI to change the models from male to female and create new listing images for about 150 products in the first month, without requiring any additional bandwidth."

However, customers are less forgiving when AI-generated images are used in advertising. Coca-Cola, BMW, Moncler, and McDonalds are just some of the major brands to experience a backlash to AI-generated images in their advertising campaigns.

Jacqueline Bourke, senior director of creative for the EMEA region at Getty Images, says: "Brands should be thinking strategically about the use of this technology. There are uses where consumers are more open to seeing AI generated imagery – for example around conceptual visuals which are not people focused.

"It is telling that the world's biggest tech companies like OpenAI and Apple are grounding their recent campaigns in human craft and being applauded for it, in comparison to beloved brands like McDonalds or Coca-Cola, both receiving backlash for ads generated entirely from generative AI," she says.

The outlook for generative and agentic AI in CX

Sharing his outlook for how the use of generative and agentic AI will develop in 2026, Thomas says the conversation will shift from "experimentation to enterprise-wide deployments, measurable ROI, and true business outcomes".

"Generative AI will continue to mature and deliver business value, powering use cases like real-time summarization, predictive insights, and dynamic knowledge across customer journeys. Leaders will focus

on measurable impact that goes beyond traditional measures like reduced cost-to-serve and faster resolution times to AI-inflected measures including intent scoring, sentiment lift, and agentic AI's ability to handle complex customer issues," he explains.

Elsewhere, more autonomous agents will handle end-to-end workflows across the front, middle, and back office. "Emerging standards such as agent-to-agent (A2A) and model context protocol (MCP) will allow AI agents to execute workflows across internal systems without human handoffs," Thomas explains.

As echoed throughout this report, governance and guardrails must remain imperative to preserve brand equity and safety, as well as customer trust. Reflecting the trend evidenced by the question on AI governance frameworks, Thomas says governance, explainability, and compliance frameworks "will become non-negotiable".

Finally, he says: "Generative and agentic AI will increasingly function as an orchestration layer across marketing, sales, and service, unifying data, workflows, and outcomes. The focus will move from automation for efficiency to intelligence for durable growth and customer trust."

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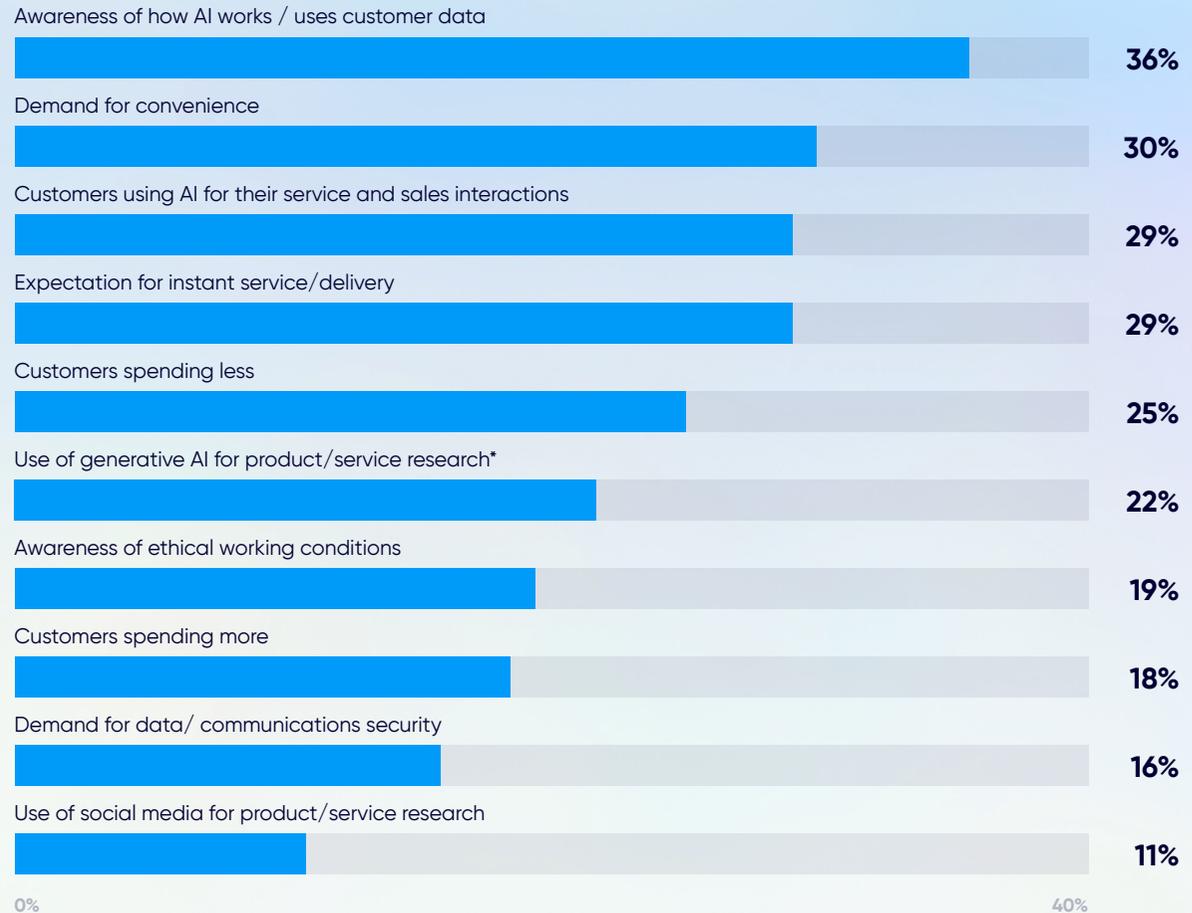
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- **Customers satisfy own need for speed and convenience**
- **The trifecta of modern loyalty: Privacy, data use, and data security**
- **Customers are increasingly AI literate**
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The customer behaviors shaping CX planning

We asked practitioners in our network to tell us which three customer behaviors are influencing their CX planning the most from a list of 14 choices, two of which (use of generative AI for product/service research and use of generative AI for purchasing products/ services) were new response options for 2026.

"The 2026 behaviors make one thing clear: loyalty will be built at the intersection of transparency, relevance, and humanity."
Montserrat Padierna, customer knowledge and experience lead for Walmart Canada

Figure 14

The customer behaviors shaping CX planning

Awareness of how AI works / uses customer data
36%

Demand for convenience
30%

Customers using AI for their service and sales interactions
29%

Expectation for instant service/delivery
29%

Customers spending less
25%

Use of generative AI for product/service research*
22%

Awareness of ethical working conditions
19%

Customers spending more
18%

Demand for data/ communications security
16%

Use of social media for product/service research
11%

0%   40%

Source: *CX Horizons: The State of CX in 2026 survey, completed by 245 network members between December 2025 and January 2026/ *This response was new for 2026*

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Customers satisfy own need for speed and convenience

When we asked practitioners to select the three customer behaviors influencing their work the most, 36 percent selected awareness of how AI works/uses customer data, followed by demand for convenience (30 percent), and customers using AI for their service and sales interactions (29 percent, see Figure 14).

These results mark a step change from previous years when the top responses consistently emerged as the expectation for instant service/delivery, demand for convenience, and customers spending less. That customers are now using AI for their interactions suggests they have replaced these demands with the ability to meet their own needs for speed and convenience.

Elsewhere in the top 10 this year, awareness of ethical working conditions has risen from ninth to seventh place (selected by 19 percent of respondents in 2026), while lower customer spending has become less of a concern, dropping from third to fifth place year-on-year.

To leverage these leading customer behaviors and nurture loyalty, Padierna says organizations need to understand that the bar has been raised.

"The 2026 behaviors make one thing clear: loyalty will be built at the intersection of transparency, relevance and humanity," she says. "Customers are more aware of how AI uses their data, more selective in their spending, and more informed before they engage. That raises the bar. Efficiency alone is no longer enough. Technology must elevate humanity, not override it."

This means transparency must be foundational and relevant in order to build loyalty. "Customers need clarity around how their information is used and confidence that it is protected," Padierna says.

The deep customer understanding this requires will see the smartest companies enhance their understanding of customers "not just through static segments, but by interpreting behavioral signals, economic realities, and emotional cues in real time", Padierna says. "Intelligence should help organizations adapt to customers, not force customers to adapt to rigid systems," she adds.

For organizations to thrive in this environment, empathy must become a design principle. "Many frustrations experienced by customers – repetition, inconsistency, lack of understanding – are the result of internal fragmentation. When market and customer intelligence teams connect VoC, operational and behavioral data effectively,

experiences become more intuitive and responsive," Padierna explains.

"Humility is equally critical," she adds. "Organizations need to walk alongside customer needs, not assume control. Giving customers agency and the ability to adjust preferences, escalate or opt out, that reinforces trust."

> "I don't think people will be able to separate 'weird social network for bots' from 'my shopping agent has my wallet'. They connect those dots instantly."
>
> **Mark Levy, author of The Psychology of CX 101**

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The trifecta of modern loyalty:
Privacy, data use, and data security

Another notable change year-on-year is the recurring theme of customer privacy, data use, and data security. As outlined in the Trends section, consumer privacy entered the top 10 CX trends for the first time in 2026, and in Figure 14 we see awareness of how AI works and uses customer data as the leading customer behavior influencing the work of practitioners.

According to Jaslyin Qiyu, CMO and head of CX for Singapore and Australia for Cigna Healthcare, customers do increasingly understand they're trading data for convenience but not without expectations: they instinctively expect smart strategies that make this exchange both "explicit and valuable".

"Data privacy incidents and algorithmic bias concerns create a demand among customers for visibility into how information gets used. Customers want personalization but increasingly insist on control over their data. Organizations must navigate this tension skillfully or face trust erosion."

She urges practitioners to "clarify the information you're capturing and how it improves their experience and gives meaningful control". She adds: "Trust becomes the currency that enables personalization."

Many practitioners are investing to better understand their customers and the research identifies three key areas where this trend is evidenced. Data insights and analytics emerged as the fifth most selected investment priority when practitioners were asked about their budget plans (Figure 10) and elsewhere in the results as many as 33 percent of respondents said they expect VoC spending to increase this year. Similarly, spending on insights, data, and analytics is set to increase in 39 percent of respondent organizations, with only 10 percent anticipating a decrease. Customer acquisition and retention costs are also expected to increase for 40 percent of respondent organizations, compared with eight percent expecting this cost to decrease.

Customers are increasingly AI literate

Despite the outlined trends concerning customer acceptance of generative AI, another major trend to emerge in recent years is customers using AI technology themselves. Therefore, in 2026 respondents were offered two new responses choices when asked about the top customer behaviors: the use of generative AI for product/service research (selected by 22 percent and ranking in sixth position), and the use of generative AI for purchasing products/ services

(selected by 10 percent of respondents and ranking in 11th place). The prominence of these results reveals consumer AI use has evolved from using generative AI to draft customer complaints, to using assistants and agents to complete tasks. This indicates consumers are increasingly AI literate.

Before the 2026 research launched OpenAI started the roll out of Instant Checkout for selected ChatGPT users and, as the research was closing, Google unveiled its agentic commerce tools for customers and organizations. With this now in the mix, these trends are expected to increase in importance again next year.

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Customers are increasingly AI literate

In January, a third major development around AI hit the headlines: Moltbook, the social network for AI agents. Taken together with the customers' heightened awareness of how AI works and uses customer data, Mark Levy, author of The Psychology of CX 101, says the net result is likely to be a further blow for customer trust.

"Moltbook, to me, did two things at once: it made AI agents feel more real, and it made them feel harder to trust," he says. "The first time I scrolled it, I had that uncomfortable 'wait… is this a room?' feeling. It wasn't a chatbot in a little support box. It was agents talking to agents, swapping advice, piling on, forming little factions. The vibe wasn't tool. It was ecosystem. And once your brain accepts that story – agents as a social layer – 'agents buying stuff for you' starts to feel like the obvious next step."

Then, Wired published its expose on how humans were posing as agents and suddenly, Levy says, the Moltbook story was "the oldest internet problem in a new costume: identity is messy, incentives are weird, and anything that looks like a public square gets gamed."

"That's not a niche concern. That's the thing regular customers remember," he says. "I don't think people will be able to separate 'weird social network for bots' from 'my shopping agent has my wallet'. They connect those

dots instantly. If you can't verify who is behind an agent, you can't trust what it's recommending. And if you can't trust it, you won't let it act, especially not when the action is spending money, changing settings, or making a decision you'll have to explain later," he adds.

What's influencing customers?

In 2026, the top customer behavior trends have shifted significantly, but reflect the tandem shift in overall CX trends outlined in the Trends section. AI is everywhere, but it's the more sophisticated AI – the type that makes decisions in the moment and works autonomously – that is changing CX. Rules-based systems are no longer at the cutting edge and hyper-personalization is now about individualizing journeys, rather than adverts or emails.

"This year, the center of gravity moved from speed to AI trust," Levy says of the results.

On the forces driving this shift, he says two are most apparent: AI is no longer a background feature and it's no longer for the exclusive use of organizations.

"AI is in the open," Levy says. "People see summaries, recommendations, automated decisions, and chat-based service as the front door. Once you put something in front of a customer, they start judging

it. Not in a philosophical way. In a practical one. 'Did this help me?' 'Did it get weird?', 'Did it make a leap I didn't ask for?' With more customers using AI to research, compare, and pressure-test what they're told before they talk to anyone, the balance in service and sales interactions has changed. The customer arrives with a short list, a set of screenshots, and a model that can ask follow-up questions they would not think to ask. If your policies are fuzzy, if your pricing has hidden edges, if your claims don't line up, it gets exposed faster," he adds.

However, Levy says the step change from 2025 to 2026 is not that customers became harder to please, "it's that they became harder to bluff".

"They want to understand what's happening, especially when AI is involved. They want convenience that doesn't hide complexity. They want service and sales interactions where the company's story holds up under scrutiny. And they're bringing their own tools to test it. It's only going to get wilder as AI proliferates," he says.

Connecting with customers in 2026

On how to connect with customers in an AI-powered environment, Thomas says brands must be mindful that expectation transfer has been magnified and "competitive parity" is now global.

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Connecting with customers in 2026

"Consumers increasingly judge every brand against the single best experience they've had anywhere. If a retailer delivers one-click resolutions or a fintech app anticipates needs in real time, that becomes the new standard for healthcare, travel, utilities, everywhere," he explains. "The bar is no longer competitive parity within your sector; it's competitive parity with the best experience on the planet."

He says this reality "raises the stakes on convenience", and that instant and proactive service is not less important, but must now be delivered alongside personalization and other AI-powered experience features. "Speed and personalization are both table stakes," he says.

It's fair to say customers have had a new normal forced upon them, which will naturally influence new behaviors. While a growing number embrace the AI era, are increasingly AI literate, and expect the best experiences possible to be delivered at all times, at the most basic level, humans also respond positively when their experiences are anchored in trust and familiarity. These foundations build loyalty, which means that in CX, there is no room for technology and trust to be mutually exclusive; connecting with customers meaningfully demands focus on governance and accountability.

"As AI becomes more embedded in customer-facing use cases, responsible deployment becomes equally critical," Thomas says. "Consumers have expectations about knowing when they're interacting with AI and how AI uses their data. Guardrails, explainability, and transparent data practices will directly influence trust and loyalty. Hallucinations or misinformation can undo years of brand equity."

He adds: "The practitioners who win in 2026 will be those who combine intelligent orchestration with visible accountability — delivering seamless experiences while making AI governance a core part of the brand promise."

> **"The bar is no longer competitive parity within your sector; it's competitive parity with the best experience on the planet."**
>
> **Greg Thomas, senior director of thought leadership for Genesys**

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THE STRATEGIC AIMS AND TOP CHALLENGES FOR CX IN 2026

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- IN NUMBERS: The challenges facing CX in 2026 and the strategic CX aims guiding organizations in 2026
- Competing priorities still plague CX
- Data security is a trust issue
- Customer growth is driven by discoverability, data collection, and interactivity
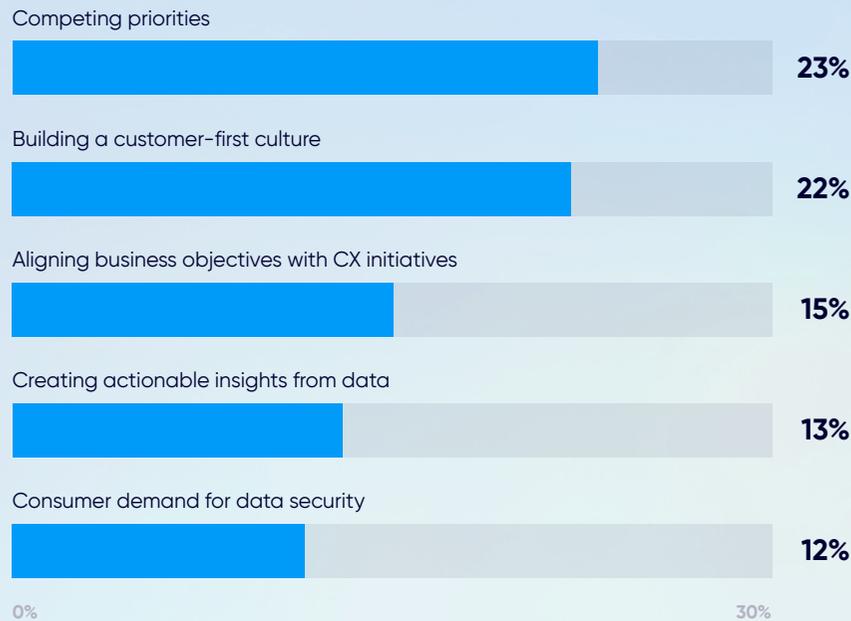
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The strategic aims and top challenges for CX in 2026

We asked our network members to select three challenges they currently face in their role from a list of more than 20 choices. The graphic below shows the five most selected responses in 2026.
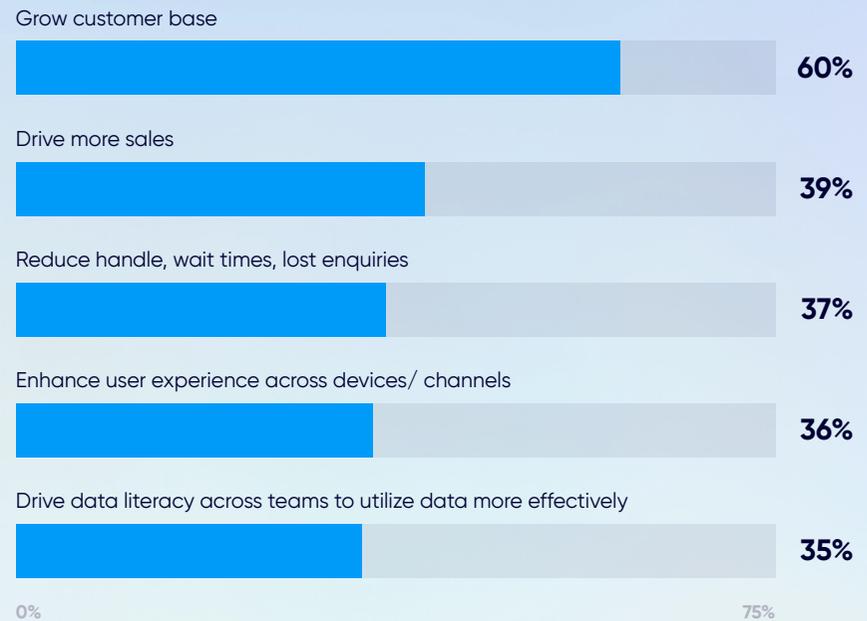
We asked practitioners to select the three leading strategic CX aims their organizations are working towards in 2026 from a list of 14 choices. This graphic shows the top five most selected choices.

Figure 15
The challenges facing CX in 2026

Challenge	Percentage
Competing priorities	23%
Building a customer-first culture	22%
Aligning business objectives with CX initiatives	15%
Creating actionable insights from data	13%
Consumer demand for data security	12%

0% — 30%

Source: CX Horizons: The State of CX in 2026 survey, completed by 342 network members between December 2025 and January 2026 / Respondents were asked to select three choices.

Figure 16
The strategic CX aims guiding organizations in 2026

Strategic aim	Percentage
Grow customer base	60%
Drive more sales	39%
Reduce handle, wait times, lost enquiries	37%
Enhance user experience across devices/ channels	36%
Drive data literacy across teams to utilize data more effectively	35%

0% — 75%

Source: CX Horizons: The State of CX in 2026 survey, completed by 342 network members between December 2025 and January 2026 / Respondents were asked to select three choices.

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Competing priorities still plague CX

Hand in hand with the most influential trends outlined in the first section of this report, CX also faces a number of challenges. Yet since 2022, competing priorities has consistently topped the list of challenges facing practitioners in their work. In fact, the 2026 results are almost identical to the 2025 results; the only change is that linking CX initiatives to ROI slipped from fifth place to sixth place year-on-year, with consumer demand for data security emerging as the fifth top challenge in 2026 (see Figure 15).

Ekaterina Mamonova, global head of broker proposition for Liberty Specialty Markets, says competing business priorities have become one of the most persistent barriers for senior CX leaders, not because organizations undervalue CX, but because – sitting at the crossroads of strategy, culture, and commercial performance – it is expected to "drive a human centered vision in environments where priorities often compete rather than align".

She explains: "CX is, by design, a longterm, relationship driven discipline. Yet it must operate within environments that frequently reward short term financial performance, fast operational outputs, and siloed departmental objectives. This tension creates a persistent push and pull that CX leaders must navigate."

As Mamonova sees it, one of the "most fundamental challenges" is the imbalance between longterm value creation and quarterly expectations. "CX requires sustained investment in people, processes, and technology – investments that may not show immediate financial return. When cost reduction or efficiency targets take precedence, CX programs are often viewed as discretionary, leaving initiatives such as employee training, journey redesign, or new platforms vulnerable to budget cuts. As a result, CX leaders find themselves advocating for transformation that competes with short-term commercial imperatives," Mamonova says.

This challenge doesn't exist in isolation. She says it is compounded by organization silos and conflicting KPIs, which see different teams optimize experiences for different outcomes – whether that's speed, acquisition, volume, or risk reduction – while CX seeks to improve the total journey. "Misaligned incentives can unknowingly undermine customer value; improving one metric in isolation often degrades the end to end experience." Operational constraints – such as fragmented data, legacy systems, and slow implementation cycles – further intensify the issue.

Finally, the human element is "frequently overlooked", Mamonova says. "When employee experience is deprioritized in favor of efficiency, customer

experience inevitably suffers. Yet proving the ROI of empathy, empowerment and culture remains a challenge, making it harder for CX leaders to secure long-term support," she adds.

> "Misaligned incentives can unknowingly undermine customer value; improving one metric in isolation often degrades the end to end experience."
>
> Ekaterina Mamonova, global head of broker proposition for Liberty Specialty Markets

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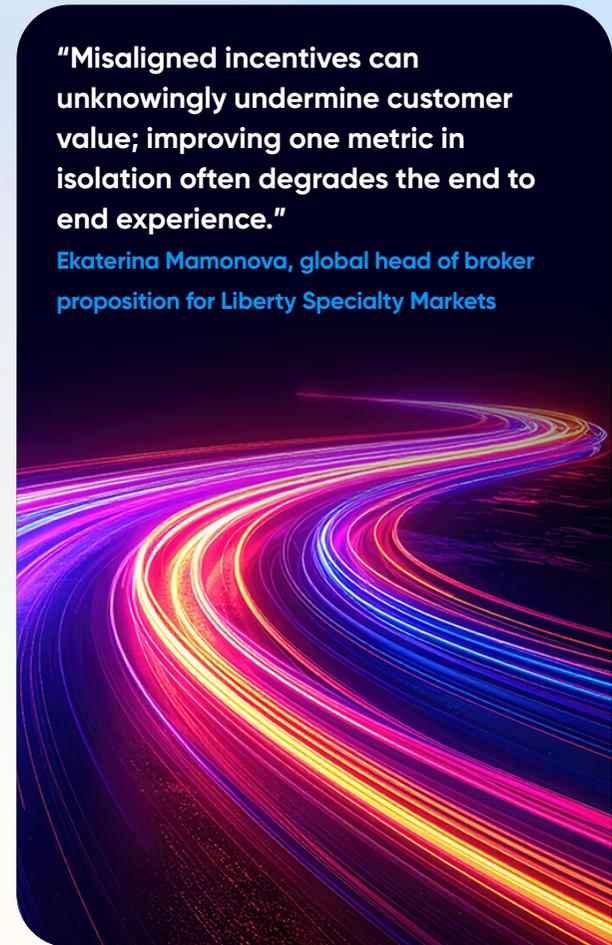
Data security is a trust issue

Elsewhere in the top challenges, consumer demand for data security emerged as the fifth most significant challenge facing practitioners this year. Duris says that in part, this is linked to consumer privacy emerging as a top CX trend, and that the result is "telling about where customer trust actually stands".

She says several factors are driving the demand for data security: escalating threats, data breaches, and identity theft have become pervasive, and cybercrime is growing more sophisticated, particularly with AI enabling smarter attacks. "Customers aren't just concerned their data is safe – they want assurance it is being used ethically and legally," she explains. Compounding these factors, Duris says there is regulatory complexity and gaps, despite the
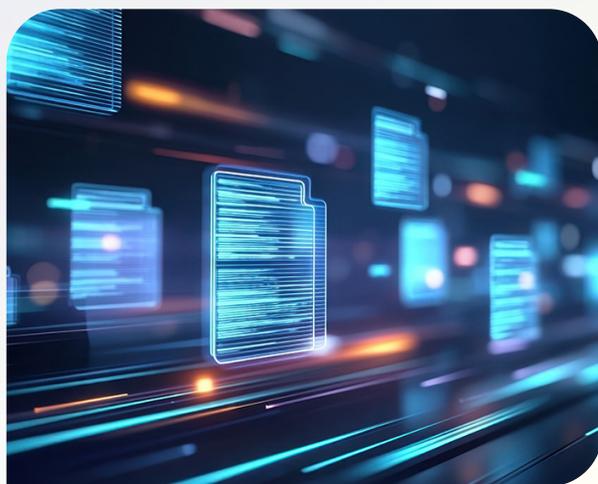
standards set by GDPR and CCPA, and that most other regions lack explicit protections. "Even where regulations exist, most customers don't understand their data rights, or what's available to them," she adds.

Furthermore, the existence of a policy does not mean enforcement and documentation are adequate, and transparency is often inconsistent, leaving customers guessing what happens with their information. "This opacity breeds distrust and makes customers vulnerable to misuse they can't see or prevent," Duris says.

Despite – or perhaps because of – these challenges, data security is rapidly becoming a competitive differentiator. Customers will switch brands for better peace of mind—knowing their data is safe and being used appropriately.

"Data security isn't just a technical issue or compliance checkbox," Duris says. "It's a trust issue. In an environment where customer trust is already at historic lows, organizations that fail to demonstrate robust data protection and transparent practices are actively eroding the foundation of customer relationships. Customers are demanding better. Brands that deliver will differentiate. Those that don't will lose."

Customer growth is driven by discoverability, data collection, and interactivity

As demonstrated in Figure 16, the top strategic aims for organizations in 2026 concern growth, experience, and skills. When we asked practitioners to select their organization's top three strategic aims from a list of 14 choices, the top response by a significant margin was to grow the customer base (60 percent), followed by drive more sales (39 percent), and reduce handle, wait times, and lost inquiries (37 percent).

However, as outlined in the Trends section, discoverability has changed and today, brands are competing for the attention of agents and bots, just as much as humans. On how to grow a customer base in this environment, Mamonova says practitioners must understand and respect how the traditional landscape has shifted.

"Buyers now expect hyperpersonalized journeys, authentic interactions, and seamless digital discovery, all while privacy regulations tighten and third party data disappears," she says. "The organizations winning new customers today are those that reimagine acquisition not as a volume game, but as a value building discipline rooted in relevance, trust, and frictionless engagement."

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Customer growth is driven by discoverability, data collection, and interactivity

There are two key steps Mamonova says practitioners can take to achieve this strategic aim:

1 Embrace Answer Engine Optimization (AEO) to support the shifts in discoverability outlined by Curtis and capture the customers who use generative AI as their primary research tool. AEO focuses on providing direct, concise answers for featured snippets and voice search, while Generative Engine Optimization (GEO) focuses on getting cited as a trusted source within broader AI-generated summaries.

2 Combat the decline of third party cookies by earning more zero party customer data through interactive tools, assessments, and personalized experiences. "This data fuels more precise targeting and significantly lowers acquisition costs," Mamonova says.

In the consumer space, brands should also be mindful of the shift in advertising: from broadcast brand-to-consumer messages to peer-to-peer recommendations through social media, with video as the primary media.

However, Mamonova says, "the winning formula in 2026 is interactivity". She adds: "Shoppable formats and authentic, conversational content shorten the distance between discovery and purchase, particularly on platforms where immediacy is the norm."

> "In an environment where customer trust is already at historic lows, organizations that fail to demonstrate robust data protection and transparent practices are actively eroding the foundation of customer relationships."
>
> **Sue Duris, principal consultant, M4 Communications**

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Conclusion:
The center of gravity and fundamental laws of CX have changed

As outlined by Thomas, CX has truly entered the AI Era, drastically changing the foundations and fundamental laws it was built on. Our research has confirmed this trend in previous years, but this year – led by agentic commerce and AI agents – AI is transforming CX from the outside, through new tools that are changing customer behaviors and business processes.

In some cases, the old rules no longer apply: customers are in the driving seat when it comes to speed and discoverability is now a battleground for bots. In other cases, the rulebook has been rewritten: loyalty, which at a glance looks to be the first victim of The AI Era, is now built on clear and explicit value exchanges that are anchored in data security – the new competitive differentiator, according to Duris – transparency, relevance, governance, authenticity,

a deep and demonstrable respect for customer privacy, and reduced customer effort. These are not constraints, Thomas says. "They are enablers of long-term loyalty. Customers and boards alike expect explainable, compliant AI that protects trust while driving innovation," he adds.

As agentic commerce takes hold, transactional loyalty will become a key factor for the agentic bots buying on a customer's behalf, while trust will be the primary driver of human loyalty.

The AI Era brings near infinite possibilities for the improvement of processes, experiences, and even career development paths, but practitioners must remember these are not set and forget technologies: as outlined by Hyder, they require ongoing optimization, tuning and updates, QA processes, and model maintenance. This means humans are as important as ever to CX, and organizational readiness and change management are paramount.

AI tools are also changing the economics of CX, from their cost models to their ongoing maintenance and optimization. However, AI also has the potential to bring transparency and clarity to the value CX delivers, whether that's through hard ROI figures or more measurable benefits across the business.

"The rise of generative and agentic AI have only started to transform how CX is delivered," Thomas says. "In 2026, organizations will focus on turning investments in AI into measurable results at scale, doubling down on orchestration via strategic CX platforms, and deploying AI in ways that protect brand safety and operate within clear guardrails."

How customers are changing

Despite approaching corporate AI use with caution, customers are increasingly using AI tools for their own CX and service tasks and this is perhaps the most profound shift to be uncovered in this year's research. As Levy says, AI is no longer a background feature and it's no longer for the exclusive use of organizations. Instead, when it comes to customers, "the center of gravity moved from speed to AI trust," he says.

This isn't just changing loyalty and retention. That customers are now consulting with or delegating to AI for their buying decisions will dictate how strategic aims are achieved in 2026. Whether it's customer base growth, stronger sales, or enhanced UX, as Mamonova says the organizations that win will "reimagine acquisition not as a volume game, but as a value building discipline rooted in relevance, trust, and frictionless engagement".

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Recent developments mean the machine customer future envisioned for so long is getting closer. Duris says: "The machines are coming – we're already seeing it with tools like Moltbook. Brands can't ignore this. Organizations must prepare and enable four interaction modes: human-to-human, human-to-machine, machine-to-human, and machine-to-machine and be ready to switch from one to another."

This shift isn't governed by brands or the vendor partners they acquire solutions from; it is dictated by Big Tech and its arrival and impact are out of our hands.

The behaviors of winning organizations

The organizations that "win" at CX in 2026, will do several key things differently: they will respect that AI needs its own foundations in order to be successful, they can combine intelligent orchestration with visible accountability, they deliver on interactivity, shoppable formats and authentic, conversational content, and they deploy AI thoughtfully, with clear guardrails that protect safety, and in ways that balance efficiency and loyalty.

On where the main opportunities lie for CX moving forward, Thomas says: "Forward-looking CX teams have long focused on experience orchestration, coordinating the customer experience across
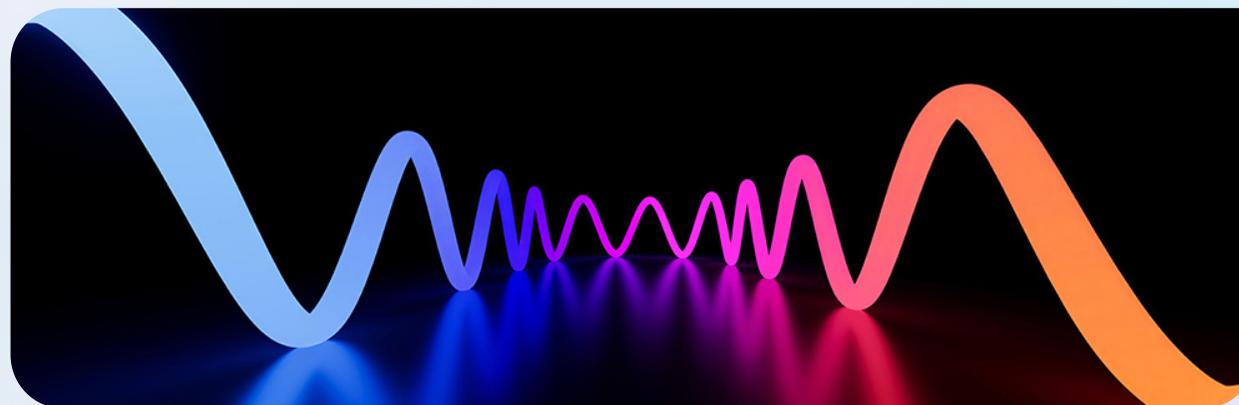
touchpoints, channels, and interactions. With the advent of agentic AI, a new era of orchestration is unfolding. The organizations that lead will be those that treat CX as an AI-powered coordination engine – designing experiences that are both frictionless and financially accountable."

He adds: "In 2026, CX will be defined by those who balance autonomy with accountability – using orchestrated AI to deliver scalable growth and durable customer loyalty."

What's on the horizon for CX

If recent months have felt dizzying, hold on: whether driven by vector AI, agentic orchestration, AI coworkers, or machine customers, the pace of change will only accelerate.

When we asked the practitioners featured in this report to share what they believe is on the horizon for CX, a clear theme emerged: focus is changing from individual tools and experiences to ecosystems that deliver the total experience. As CX becomes anticipatory and proactive, customers will come to expect journeys where problems do not occur; governance, privacy and ethical AI will sit at the heart of CX strategy, rather than with legal or compliance; and leading CX practitioners will be defined by their technological skillset, intelligent AI use, and ability to still ensure human judgment is applied across the board.

In this environment, CX is on track to become a strategic growth engine, supported by some of the most sophisticated technology available. In short, the brightest days are yet to come.

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What's on the horizon for CX?

To conclude our research, we asked the 12 CX practitioners featured in this report to share the developments and trends they believe will shape CX to 2030. This graphic demonstrates what they believe is on the horizon for CX.

Plan Now

Act Now

Watch for Now

Seamless "phygital" journeys incorporating AR/VR, in-store customization

Stronger human–AI collaboration mode

Shift to preventing service contacts

Human expertise becomes a curated, high-value resource for CX that requires empathy and judgement

CX must reconcile heightened AI use with environmental impact

Predictive, pre-emptive service

Hyper-personalized journeys shaped by intent, sentiment, and context.

Support as a strategic growth engine

End-to-end proactive orchestration, powered by AI but anchored in human judgment

Speed to market as a basic requirement

Customer trust based on ethical AI use, data privacy, and sustainability

Voice AI

Connecting data, channels, and workflows

Machine-to-machine interactions

AI as a trusted co-worker

Continuous, closed-loop intelligence systems embedded into business operations

Operational performance shaping CX more than channels

Maturation of AI governance driven by regulatory enforcement

Intelligent, emotionally aware ecosystems powered by AI

Human-to-machine and, machine-to-human interactions

CX leaders will act as experience architects and trust stewards

CX practitioners will be defined by tech skillset and intelligent AI use

Stronger standards for data use, transparency, and consent

Vector AI

Agentic commerce

Commoditization of BFSI products, basic healthcare, logistics due to AI simplifications

AI will push questions of fairness, explainability, accessibility, and data integrity to center of CX

Consumer Demand **Organizational Change** **Big Tech Innovation** **Big Tech Innovation** **Organizational Change** **Consumer Demand**

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