

Reimagining customer experience

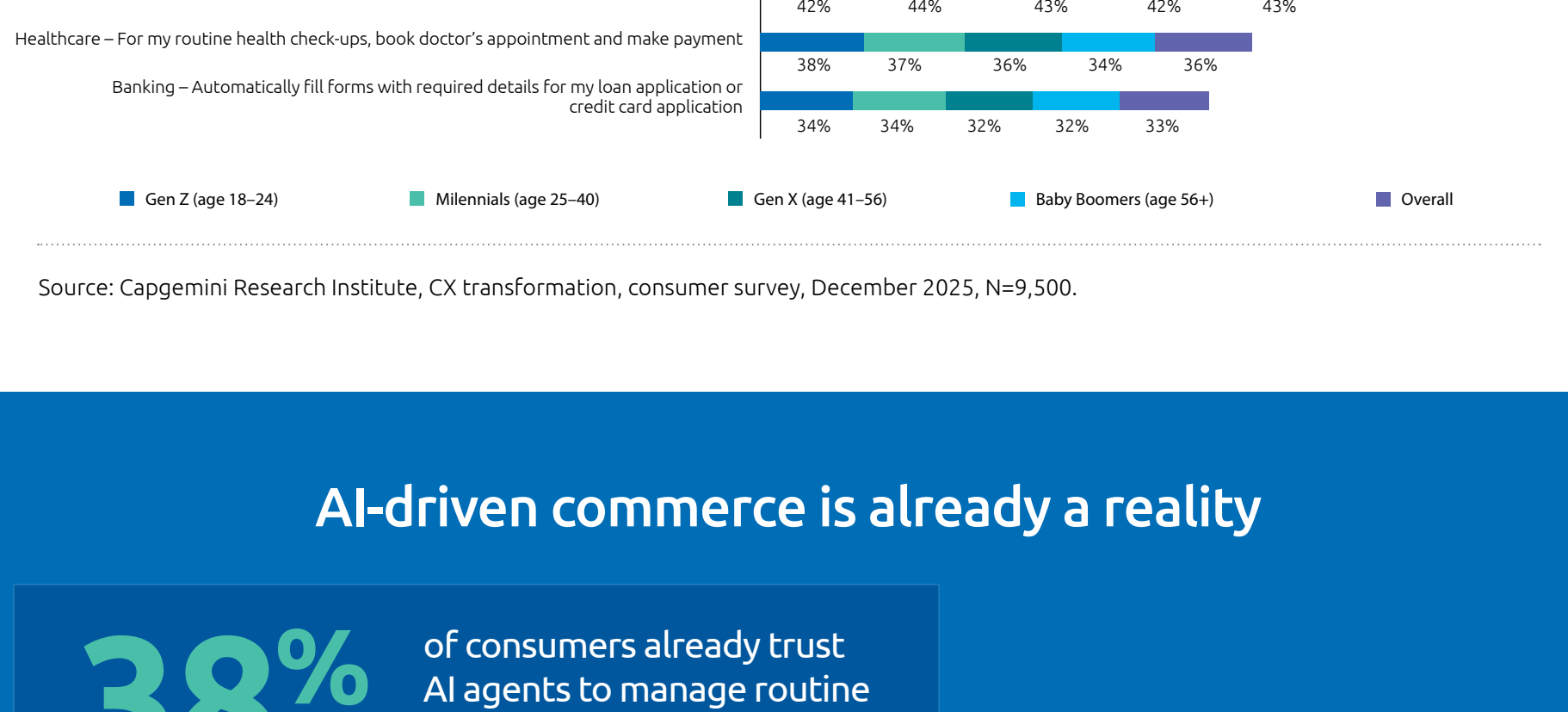
Human-led, AI-powered

Make it real.

AI's growing capabilities are transforming CX

AI is a consumer essential

Consumer willingness to use AI agents in the next 3 years – Top use cases by sector and by age



Source: Cappgenini Research Institute, CX transformation, consumer survey, December 2025, N=9,500.

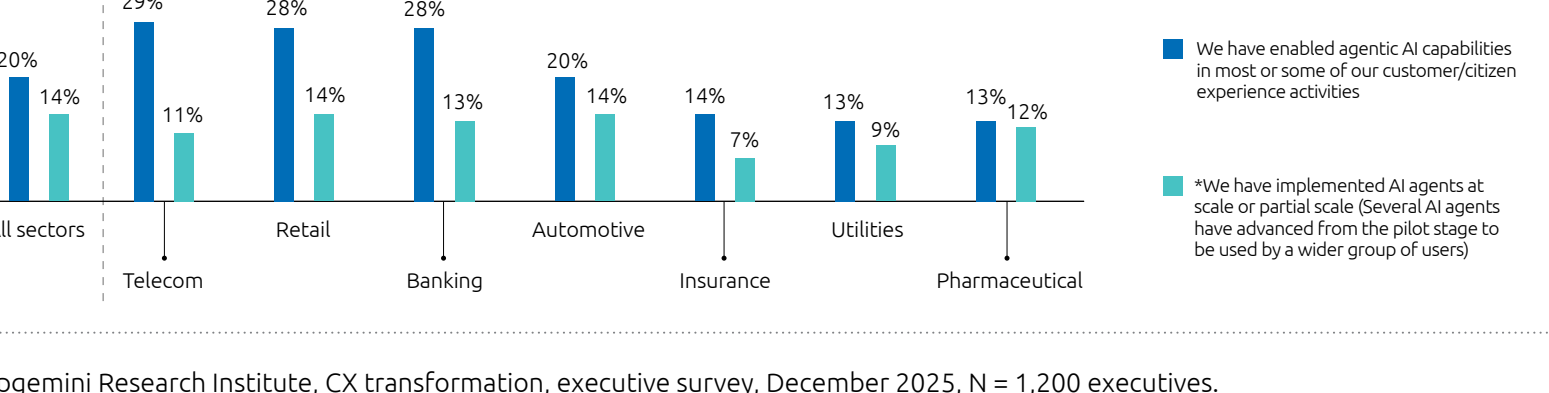
AI-driven commerce is already a reality

38% of consumers already trust AI agents to manage routine purchases and payments

58% appreciate the associated time savings

The shift from SEO to GEO

A significant portion of organizations see strong value in generative engine optimization (GEO):



One out of five organizations has enabled agentic AI capabilities for CX

Percentage of executives agreeing that they have enabled agentic AI capabilities to improve customer experience



Source: Cappgenini Research Institute, CX transformation, executive survey, December 2025, N = 1,200 executives.

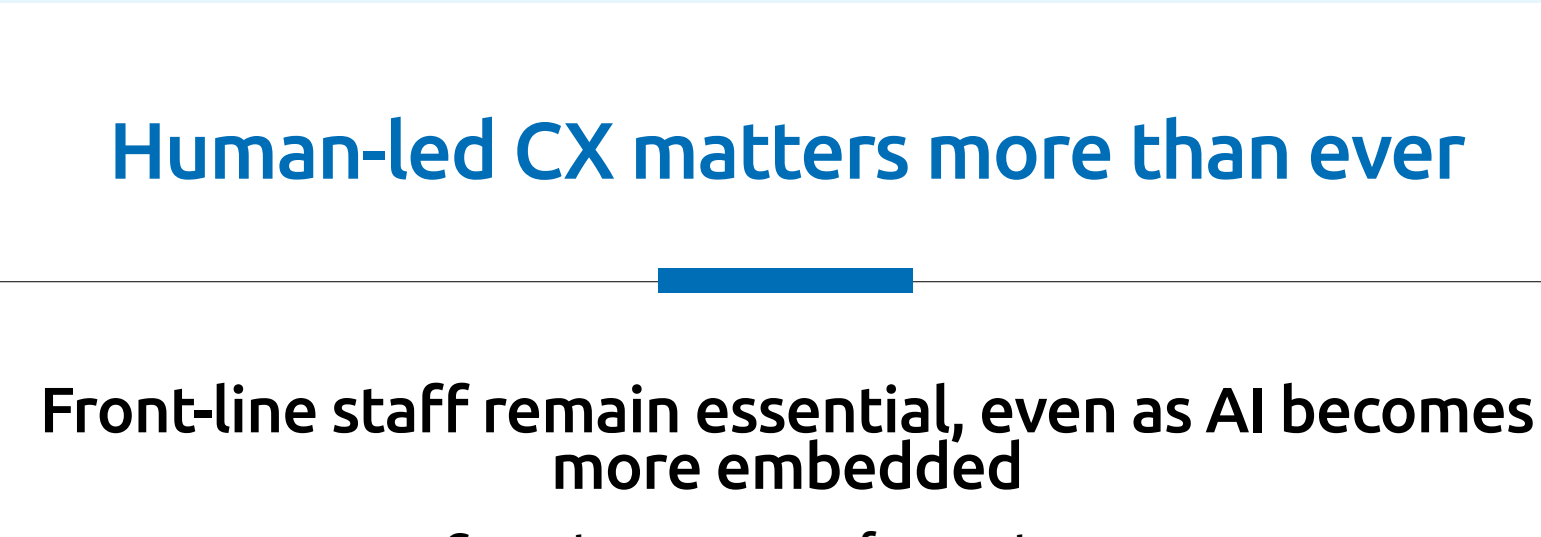
*Source: Cappgenini Research Institute, Agentic AI, April 2025, N = 1,522 executives from corporate and data/AI functions.

Note: For comparison with the Agentic AI report, we mapped only common sectors and aligned other sectors to the closest matching category. Sectors not common to both reports were excluded for comparison. These aligned sectors are treated as equivalent to ensure consistent comparison with the CX transformation report (e.g., life sciences to pharmaceuticals, banking and capital markets to banking, energy and utilities to utilities, etc.).

Data security and trust: Prioritized by consumers, ignored by organizations

More than 80% of consumers say data security is a top concern

Consumer vs. executive perception of data security across touchpoints – by country



Source: Cappgenini Research Institute, CX transformation, consumer survey, December 2025, N = 8,740 consumers. (Australia = 570 consumers, Brazil = 475 consumers, France = 950 consumers, Germany = 760 consumers, Italy = 570 consumers, Japan = 475 consumers, Netherlands = 665 consumers, Spain = 570 consumers, Sweden = 285 consumers, Norway = 285 consumers, UK = 1,140 consumers, US = 1,425 consumers)

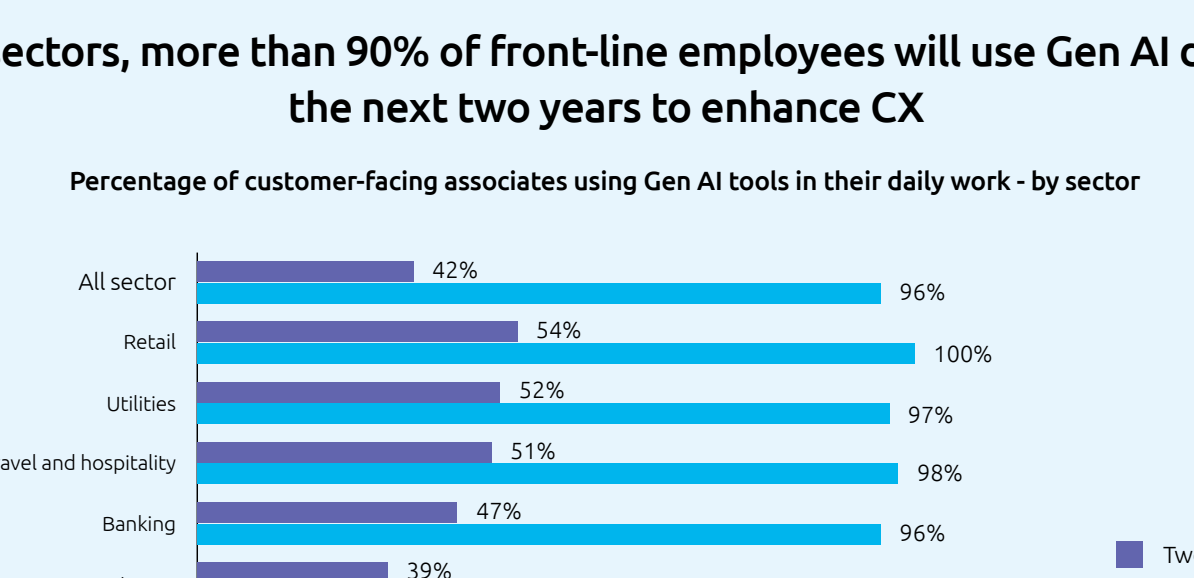
Cappgenini Research Institute, CX transformation, executive survey, December 2025, N = 1,090 executives. (US = 165 executives, UK = 134 executives, France = 110 executives, Germany = 96 executives, Italy = 72 executives, Spain = 72 executives, Netherlands = 84 executives, Nordics (Sweden, Norway) = 72 executives, Singapore = 60 executives, Japan = 80 executives, Australia = 75 executives, Brazil = 70 executives)

Human-led CX matters more than ever

Front-line staff remain essential, even as AI becomes more embedded

Current consumer preference to use Gen AI-integrated bots/AI agents vs. human support

Percentage of consumers who rank human support and Gen AI-integrated bots/AI agents among their top three preferred interaction channels across sectors

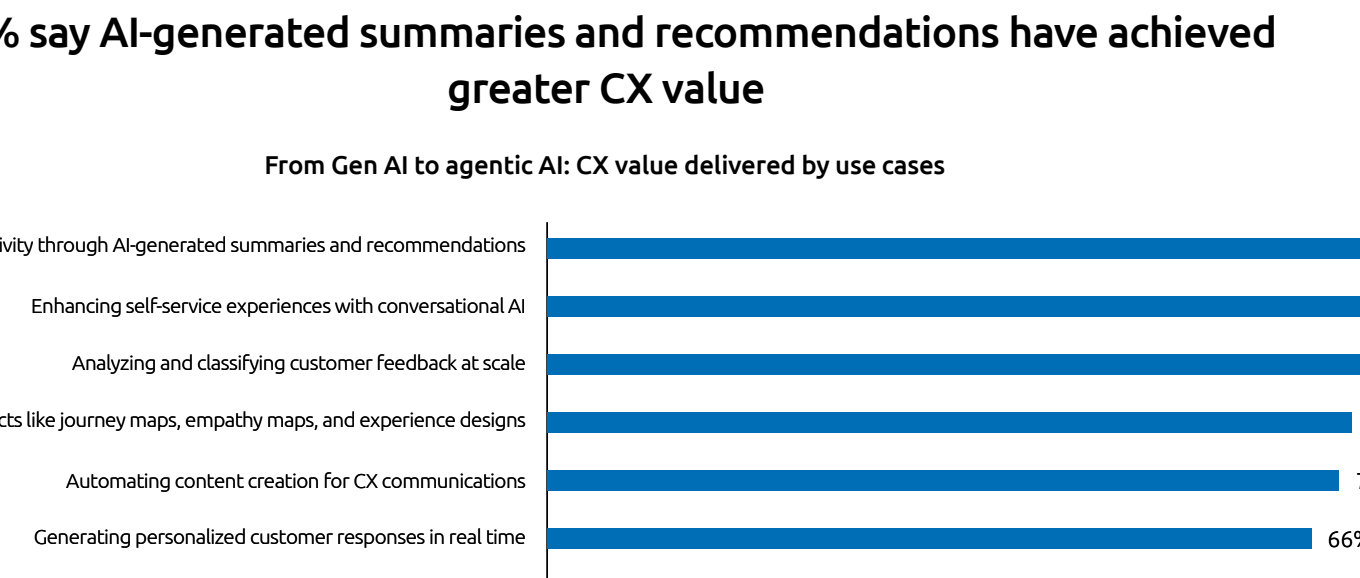


Source: Cappgenini Research Institute, CX transformation, consumer survey, December 2025, N = 9,500 consumers.

AI integration is reshaping front-line staff workflows

Across sectors, more than 90% of front-line employees will use Gen AI daily over the next two years to enhance CX

Percentage of customer-facing associates using Gen AI tools in their daily work - by sector

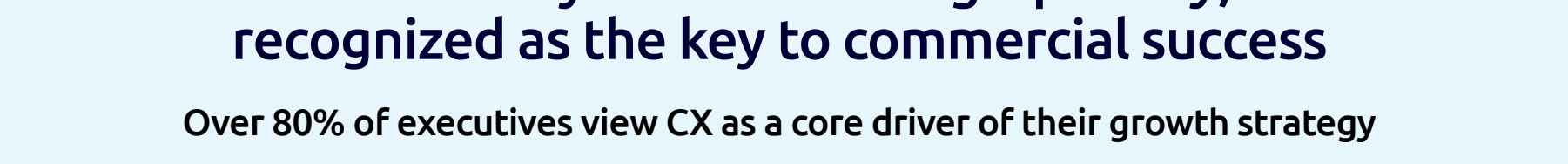


Source: Cappgenini Research Institute, CX transformation, executive survey, December 2025, N = 480 customer-facing associates.

AI is already delivering CX value

87% say AI-generated summaries and recommendations have achieved greater CX value

From Gen AI to agentic AI: CX value delivered by use cases

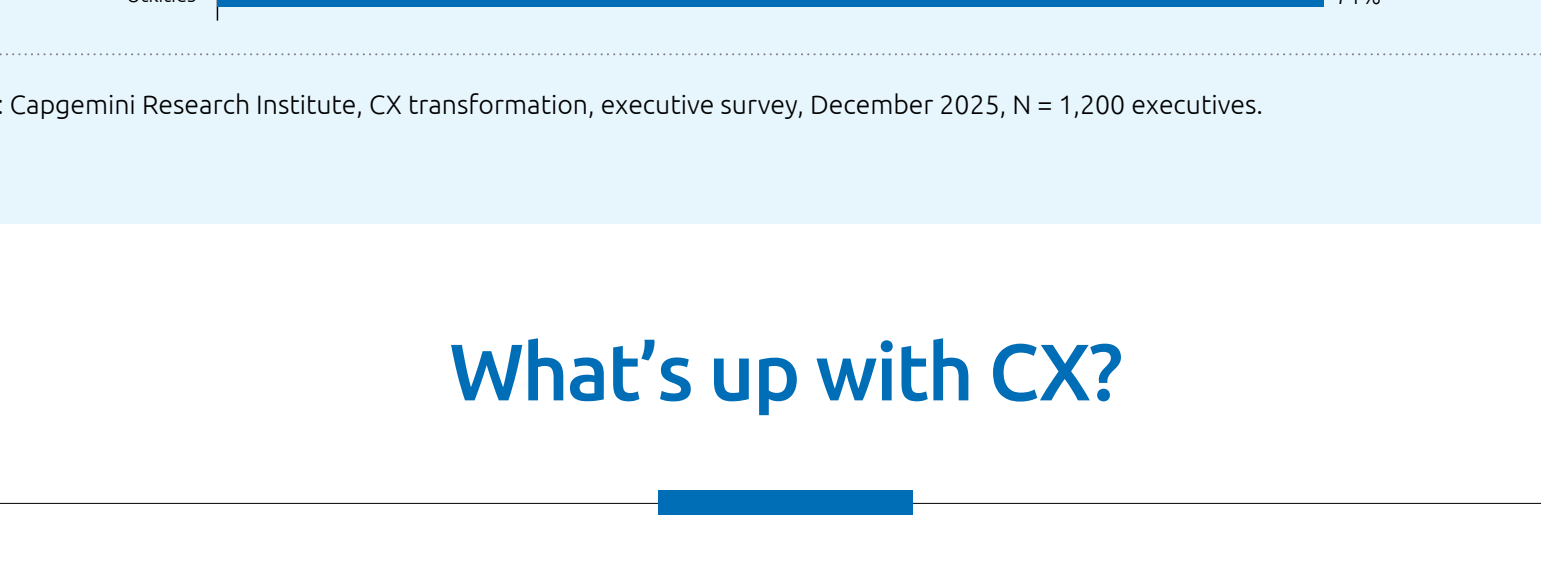


Source: Cappgenini Research Institute, CX transformation, executive survey, December 2025, N = 1,200 executives.

While CX has always been a strategic priority, it is now recognized as the key to commercial success

Over 80% of executives view CX as a core driver of their growth strategy

Percentage of executives who agree with the statement: "Customer/citizen experience is now a core driver of our growth strategy"

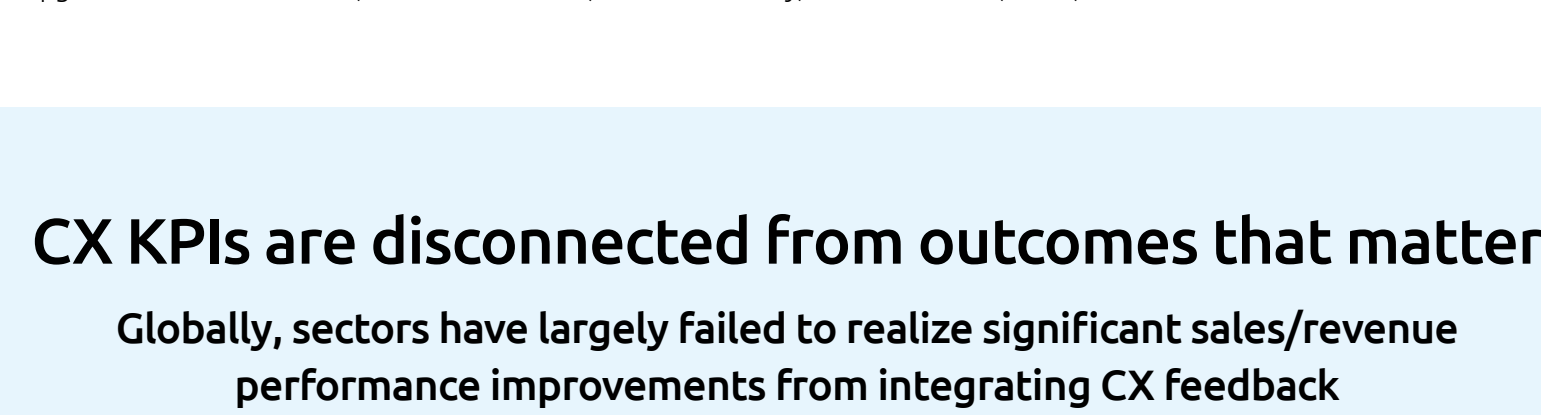


Source: Cappgenini Research Institute, CX transformation, executive survey, December 2025, N = 1,200 executives.

What's up with CX?

Organizations lack a clear CX roadmap

Only one in five organizations has a unified, comprehensive strategy, vision and roadmap of the customer journey

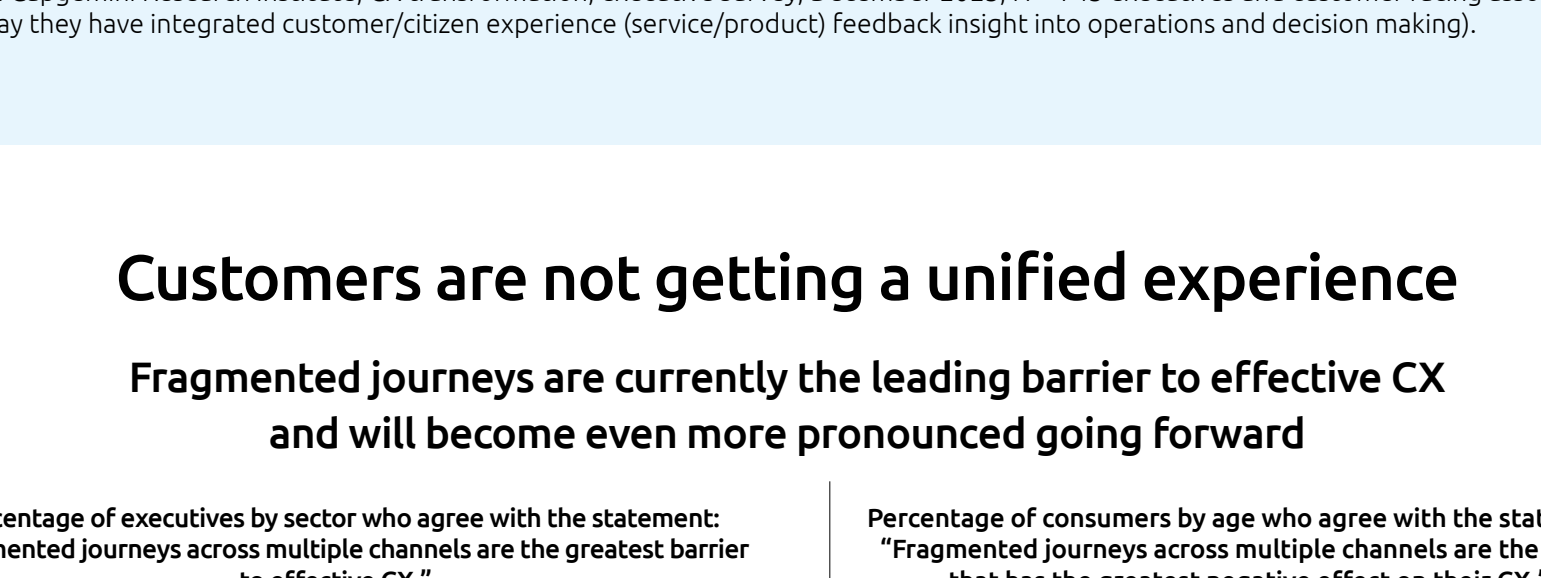


Source: Cappgenini Research Institute, CX transformation, executive survey, December 2025, N = 1,200 executives.

CX KPIs are disconnected from outcomes that matter

Globally, sectors have largely failed to realize significant sales/revenue performance improvements from integrating CX feedback

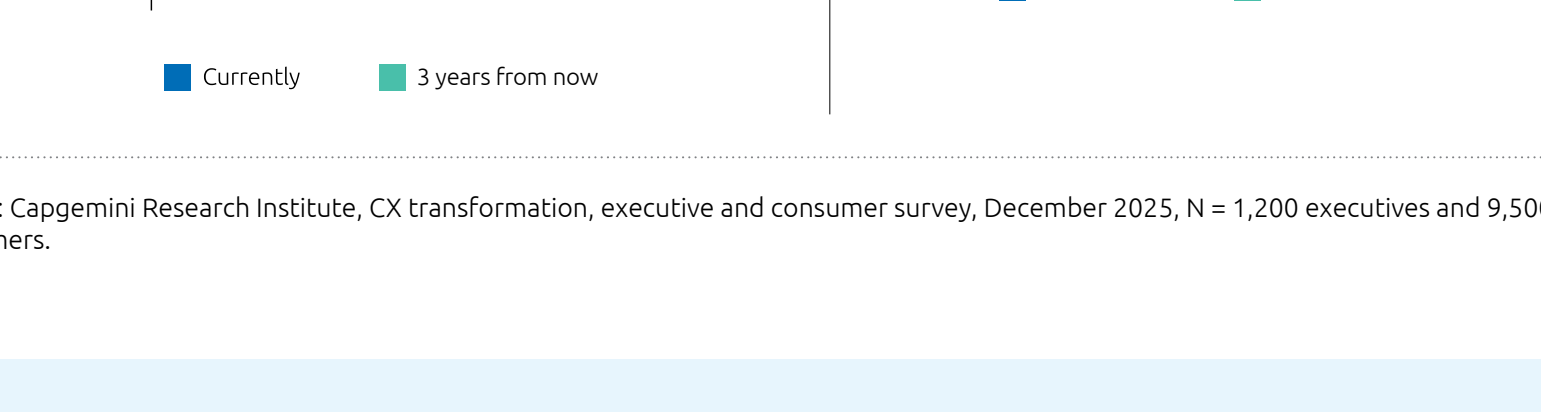
Percentage of organizations that benefited from improved sales performance by integrating customer/citizen experience feedback insights across functions/departments – global average versus industry comparison



Source: Cappgenini Research Institute, CX transformation, executive survey, December 2025, N = 745 executives and customer facing associates (Who say they have integrated customer/citizen experience (service/product) feedback insight into operations and decision making).

Customers are not getting a unified experience

Fragmented journeys are currently the leading barrier to effective CX and will become even more pronounced going forward

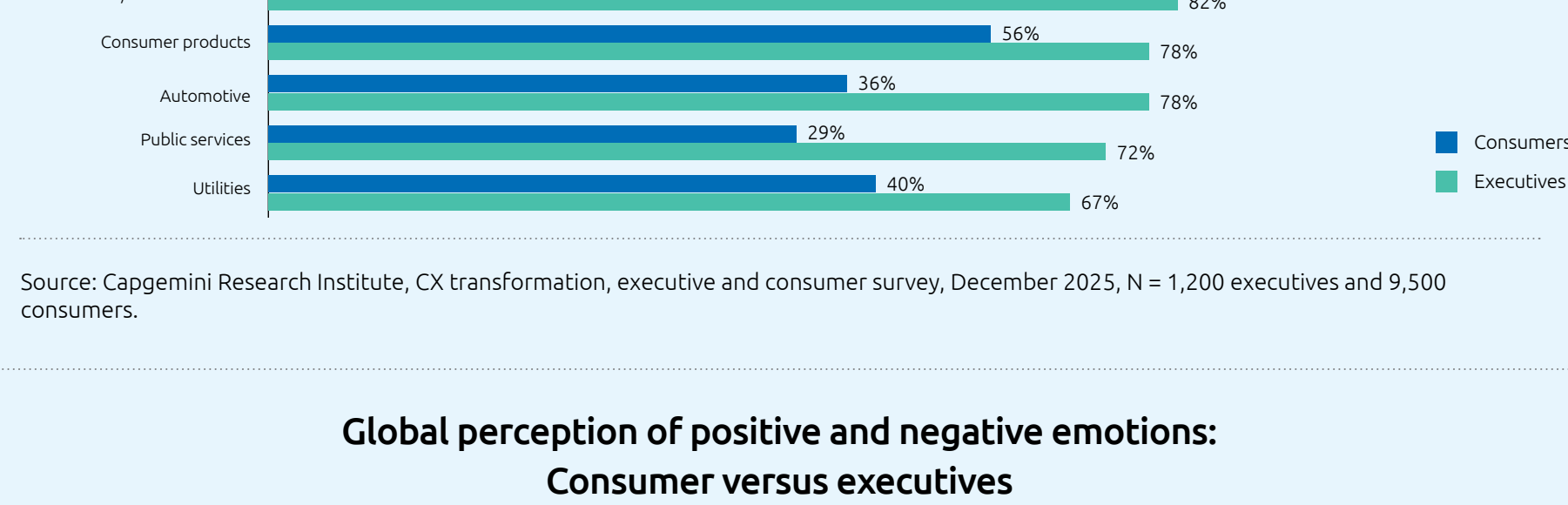


Source: Cappgenini Research Institute, CX transformation, executive and consumer survey, December 2025, N = 1,200 executives and 9,500 consumers.

Executive and customer CX expectations are misaligned

Executive optimism markedly exceeds consumer likelihood to recommend their products or services based on CX

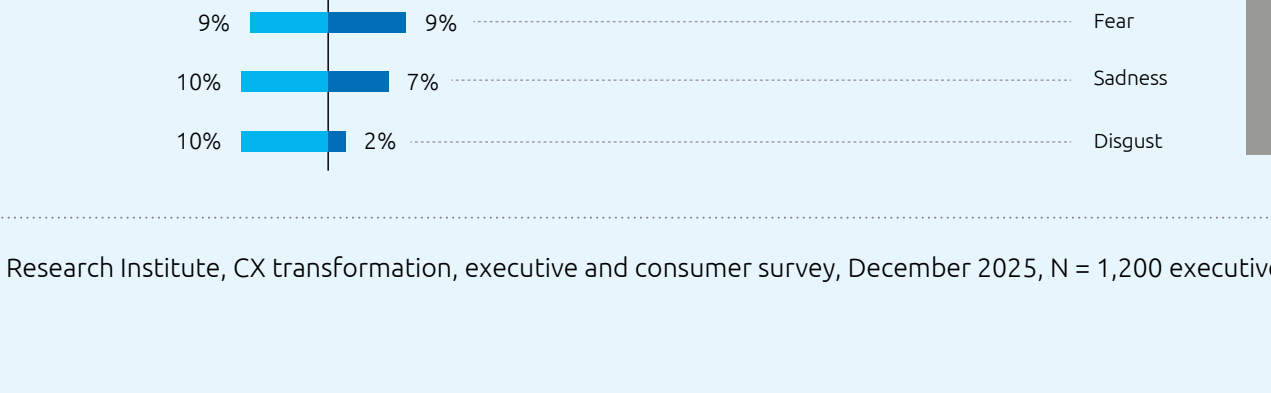
Recommendation likelihood across sectors: Executive vs. consumer view



Source: Cappgenini Research Institute, CX transformation, executive and consumer survey, December 2025, N = 1,200 executives and 9,500 consumers.

Global perception of positive and negative emotions: Consumer versus executives

Perception of emotions: Consumers vs. executives (global)

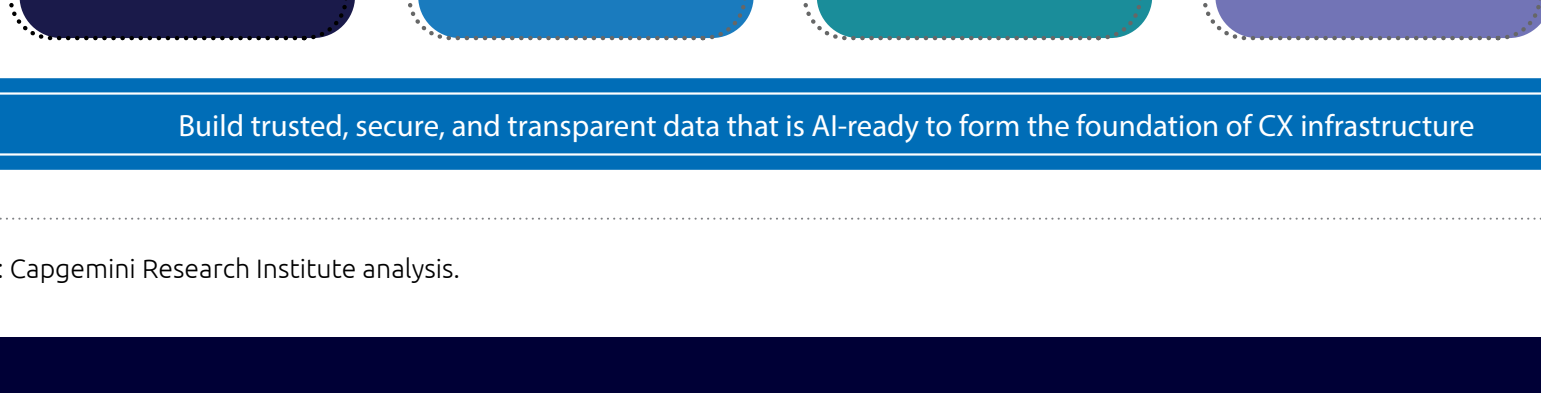


Source: Cappgenini Research Institute, CX transformation, executive and consumer survey, December 2025, N = 1,200 executives and 9,500 consumers.

How to build human-led, AI-powered CX

Define CX objectives and align with desired business outcomes

Establish a clear, shared CX roadmap



Build trusted, secure, and transparent data that is AI-ready to form the foundation of CX infrastructure

Source: Cappgenini Research Institute analysis.

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