

New minds, New marketers

Overview



CANNES LIONS

We're not just witnessing another technological leap; we're experiencing a profound societal transformation driven by artificial intelligence.



As consumers increasingly integrate AI into their daily lives, the very essence of how brands connect with people is being redefined. This isn't a distant future; it's happening now, and it presents an unprecedented opportunity for Chief Marketing Officers to lead from the front.

This research delves into the critical juncture where consumer AI adoption outpaces the readiness of marketing leaders. Our research, building on insights from our "New Minds, New Markets" report, reveals that AI-friendly consumers are poised to drive \$6.3 Trillion in spending by 2030 across the US, UK, Germany and Australia alone. But many CMOs are still grappling with the foundational aspects of this revolution. We explore the nuanced landscape of AI integration across the customer journey—from discovery to post-purchase—and uncover the preparedness gap that exists today.

So, how do we bridge this gap? How do we, as marketing architects, not just navigate but master this AI-mediated world? This report offers actionable advice on how to transform marketing functions from reactive adaptation to proactive leadership. It's time for CMOs to embrace their expanded mandate, becoming the visionaries who not only understand the algorithms but also champion the enduring human connections that will define brand success in the AI era.

**THEA HAYDEN,
CHIEF MARKETING OFFICER AT COGNIZANT**

The future of business is being written by two powerful forces: human ingenuity and artificial intelligence.

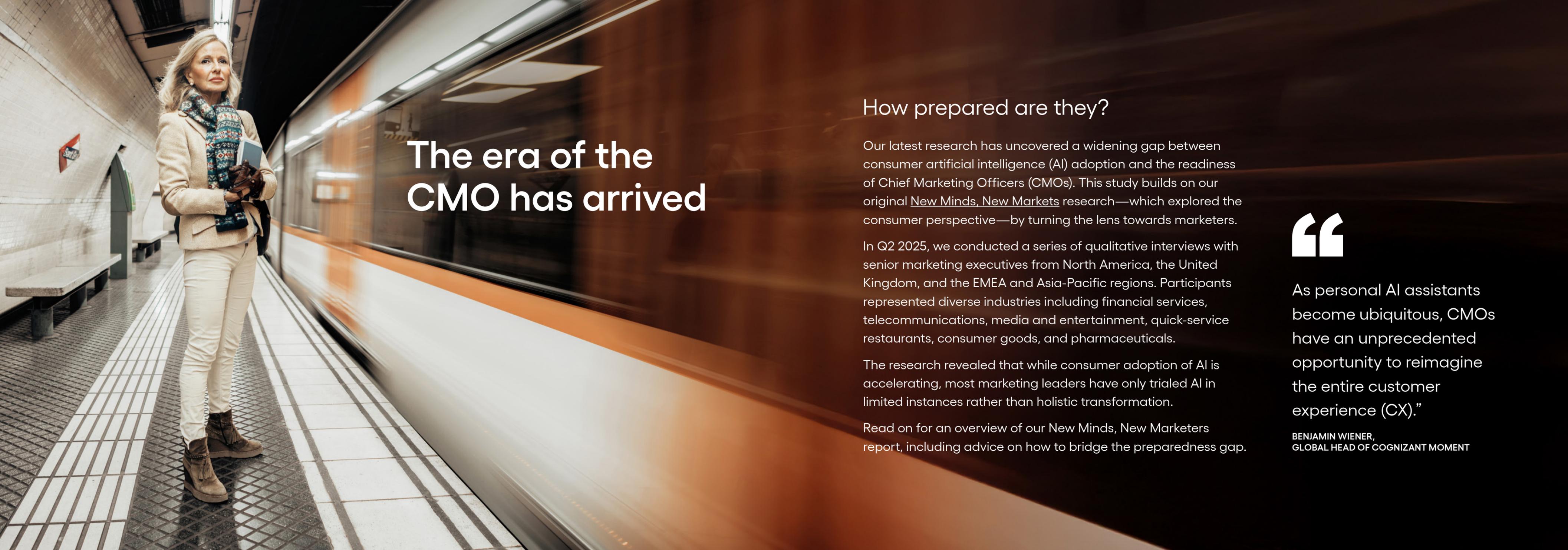


We stand at a pivotal moment where AI isn't just optimizing processes; it's fundamentally reshaping how our customers live, work, and buy. Our latest research indicates that by 2030, AI-friendly consumers will account for a staggering 55% of purchasing activity. This isn't merely a technological upgrade; it's a re-architecture of the entire market, and understanding this shift is paramount for every CEO.

This global, multi-market research offers a crucial lens into this transformation, focusing on the widening gap between rapid consumer AI adoption and the current readiness of many organizations, particularly within their marketing functions. While consumers are already embracing AI for everything from daily tasks to purchasing decisions, our findings suggest that many businesses are still in the early stages of preparing for this new reality. We examine the three waves of market transformation—from optimizing for AI discovery to full, human-reduced decision-making—and the critical implications for your strategic growth.

For CEOs, this moment demands more than just awareness; it calls for decisive action. The leaders who recognize that AI isn't just a cost-saving tool but a fundamental driver of customer relationships will be the ones to thrive. This report provides a roadmap for integrating AI not just into your tech stack, but into the very fabric of your customer experience and brand strategy. It's an invitation to lead your organization through this era of profound change, ensuring your brand remains relevant, differentiated, and connected in an AI-mediated world.

**BENJAMIN WIENER,
GLOBAL HEAD OF COGNIZANT MOMENT**



The era of the CMO has arrived

How prepared are they?

Our latest research has uncovered a widening gap between consumer artificial intelligence (AI) adoption and the readiness of Chief Marketing Officers (CMOs). This study builds on our original [New Minds, New Markets](#) research—which explored the consumer perspective—by turning the lens towards marketers.

In Q2 2025, we conducted a series of qualitative interviews with senior marketing executives from North America, the United Kingdom, and the EMEA and Asia-Pacific regions. Participants represented diverse industries including financial services, telecommunications, media and entertainment, quick-service restaurants, consumer goods, and pharmaceuticals.

The research revealed that while consumer adoption of AI is accelerating, most marketing leaders have only trialed AI in limited instances rather than holistic transformation.

Read on for an overview of our [New Minds, New Markets](#) report, including advice on how to bridge the preparedness gap.



As personal AI assistants become ubiquitous, CMOs have an unprecedented opportunity to reimagine the entire customer experience (CX).”

BENJAMIN WIENER,
GLOBAL HEAD OF COGNIZANT MOMENT

The CMO of 2030

Marketing leaders are uniquely positioned to drive organizational change because they serve as the interface with consumers. Their world is accustomed to identifying trends and moving quickly—capabilities essential in navigating the AI revolution.

The challenge is substantial. When everyone uses AI trained on similar datasets, marketing content risks becoming homogenized. With reduced originality and creativity, brands end up on the same level playing field. The key question becomes: how do you differentiate yourself and be brilliant?

New skills and competencies

The CMO of 2030 will require an evolved skill set from today's marketing executives. Technical literacy, data fluency, and ethical AI governance will be as critical as traditional marketing expertise.

Because content that marketing teams produce—images, words, creative materials—is directly challenged by generative AI, the CMO is at the forefront of needing to leverage this technology. Marketing leaders will serve as the trailblazers for the rest of the organization, demonstrating how to implement AI agents and generative AI more broadly.



The era of the CMO has arrived. While our job titles may evolve, our mandate has never been clearer: we must become the architects of brand experiences in an AI-mediated world.”

THEA HAYDEN, CHIEF MARKETING OFFICER AT COGNIZANT



Vision 2030: a glimpse into the future

A day in the life of Jacob, AI-empowered CMO

CMO Jacob begins his day by reviewing an AI-generated report that highlights overnight shifts in consumer sentiment across key markets. His marketing suite has already adjusted campaign parameters, optimizing performance without human intervention for routine decisions.

Instead of managing content calendars or approving social posts, Jacob focuses on his brand's latest immersive experience: a collaboration with a trending entertainment property. His creative team has leveraged generative AI to develop multiple concepts that maintain brand integrity while exploring bold new territory.

"The AI gave us a starting point," his Creative Director explains, "but we've added the emotional resonance and cultural nuance that machines still struggle with."

Later, Jacob meets with his AI ethics committee to review an agent partnership strategy. His brand's products must remain discoverable and competitive as more purchases shift to AI-mediated transactions.

"Our brand stands for creativity and self-expression," Jacob reminds the team. "We need to ensure that the value proposition remains clear when consumers discover us through their personal AI agents."

Jacob's role has evolved from campaign manager to experience architect. He's no longer just responsible for marketing the product but for ensuring the product itself carries the marketing message in an AI-mediated world. His team is smaller but more strategic, focused on creative direction rather than execution, with AI handling the operational aspects that once consumed 70% of their time.



Vision 2030: a glimpse into the future

A day in the life of Sarah, AI-empowered consumer

It's 6.15 am when Sarah's sleep is gently disrupted by her AI assistant, which has analyzed her sleep patterns and determined the optimal wake time. "Good morning," it says. "Your sleep quality was 58% last night. I've noticed your mattress is showing signs of wear, according to your sleep data. Based on your preferences and health profile, I've researched options and can recommend three beds that would improve your comfort."

Sarah reviews the suggestions on her wall display, asking questions about materials and sustainability. Her AI has already negotiated the best available price from her preferred retailers, taking into account her loyalty status. "The one with natural fibers looks good," she decides. "Order it." Her AI confirms delivery for Friday afternoon, when her calendar shows she'll be working from home.

Later, her AI arranges for her old mattress to be recycled, updates her home inventory, and seamlessly registers the warranty. When the new mattress arrives, it's already synced with her home system. That night, Sarah sleeps better, and her AI begins collecting data to optimize her bedroom temperature and lighting based on the thermal properties of her new mattress.

No search engines were involved. No comparison shopping. No forms to fill out. Just contextual awareness, personalized recommendations, and frictionless execution.

The AI era is already underway

55%

Of purchasing activity conducted by AI-friendly consumers by 2030

75%

See convenience as a key factor in AI adoption



This fundamentally puts marketing at the heart of the business. You can no longer silo it as traditionally done. Everything will be driven by all elements of the business working in concert. CMOs who can leverage the entire organization around that agenda will become the most powerful people in driving performance and sales.”

IAN BARLOW, GLOBAL HEAD OF MARKETING AND ADVERTISING SERVICES
AT COGNIZANT MOMENT

By 2030, AI enthusiasts will drive consumer spending

\$4.4T
in the US

\$690B
in the UK

\$540B
in Germany

\$670B
in Australia

The rise of the AI-powered consumer

Our [New Minds, New Markets](#) report reveals that AI-friendly consumers will drive up to **55% of consumption purchasing by 2030, equivalent to \$4.4 trillion in the US alone and £690 billion in the UK**. This shift represents a fundamental transformation in how people discover, purchase, and engage with products and services.



Learn phase:

Highest comfort with AI-driven discovery



Buy phase:

Significant hesitation during purchasing



Use phase:

Growing acceptance of AI in post-purchase interactions

The findings demonstrate varying comfort levels across different phases of the customer journey:



Where CMOs stand

Our new research indicates that marketing leaders are feeling overwhelmed by the pace of change. Things are happening so rapidly that it's very hard for them to keep up. Across industries, we're seeing a "rabbit in headlights" syndrome as CMOs try to navigate the evolving AI landscape.

Three waves of market transformation (2025-2030)

Wave 1 (2025-2027):

Businesses optimize for AI discovery

Wave 2 (2027-2029):

Engineering AI features into products and infrastructure

Wave 3 (2030+):

Full transformation with reduced human involvement in decision-making

The research reveals that CMOs are primarily focused on Wave 1 of market transformation, the discovery phase. They recognize that consumers are increasingly using generative AI, but view this as just another channel to add to their mix, rather than a fundamental disruption to the customer journey.

Industry contrasts in marketing AI adoption

Pharmaceuticals and financial services are lagging behind in AI adoption for marketing, while the media, entertainment, and fast-moving consumer goods (FMCG) sectors are further advanced. These sector dynamics reflect differing regulatory environments, risk tolerances, and consumer expectations.

The consumer journey transformed

Learn phase: high comfort with AI-driven discovery

Consumers are already comfortable with AI-driven discovery tools, with high comfort levels in the Learn phase. Currently, CX leaders are primarily focused on AI in the discovery phase of the customer journey. Their mental models here are search engines, which some say will be replaced by AI platforms, voice assistants, and, in some industries, aggregators.



Google's business model [driven by search engine optimization] is disappearing. Content providers who write articles and publish them on websites to drive traffic and monetize audiences ... that entire ecosystem is being disrupted. It's a real transformation."

TELECOMS EXECUTIVE

Buy phase: current resistance to AI-driven purchasing

The Buy phase shows the lowest consumer comfort with AI. This reflects consumers' concerns about relinquishing control over purchasing decisions. When it comes to agentic AI provided by third parties, most CX leaders are not yet making concrete plans because they feel it is too soon.

Use phase: growing acceptance of AI in post-purchase

The Use phase shows improved consumer comfort with AI as people appreciate AI's role in customer service, product optimization, and maintenance. AI can transform the experience of chatbots, which CX leaders often acknowledge can be frustrating for consumers.

Strategic imperatives for CMOs

Our interviews uncovered three areas marketing leaders should consider:

- 1. Moving beyond experimentation to scaled implementation**
- 2. Embracing adaptive, agile approaches to AI integration**
- 3. Preparing for third-party AI agents**



We don't know what the future holds, but there are so many opportunities. We have to adapt and we will."

MANUFACTURING EXECUTIVE



Brand relationships in the AI era

Brands will need to evolve in response to AI and learn how to integrate themselves into the new customer journey. But CX leaders believe that the fundamentals will remain the same: namely, the need for emotional connections, differentiation, a compelling value proposition, and good customer experiences. Plus, physical product experience remains unchanged regardless of how consumers discover or purchase items.

AI could make the basics of brand relationships much harder to execute. **“Brands will have to work much harder to differentiate and build relationships,” a financial services executive warned. “They’ll face a much more informed consumer making that first purchase.”**

The challenge intensifies as AI agents become intermediaries between brands and consumers. Unlike traditional search engines or social media platforms, AI agents synthesize information from multiple sources before presenting recommendations. CX leaders are particularly concerned about ceding control of brand messaging.

This means that CMOs must ensure that brands excel across all touchpoints—from product quality to customer service to online presence — because any weakness could eliminate them from consideration.

Best practice examples

Forward-thinking organizations are already demonstrating how to maintain brand relationships in an AI-powered world. These examples show practical approaches to building trust, delivering value, and creating differentiation.

Context-aware customer service

One FMCG company has transformed its customer touchpoints from basic chatbots to intelligent advisors. “The context retention is much better and the advice feels authentic,” their executive explained. “These chats are stripped of personalized information and analyzed to create dashboards for key people, telling them about feedback, complaints, and suggestions.”

Seamless omnichannel experiences

A media and entertainment executive outlined their vision for connected experiences. “Customers can expect more continuous and contextual communication,” they said. “The platform understands their context, background, and previous purchases. It’s much more predictive and proactive. If I’m watching a show, the next recommendation isn’t just based on viewing history, but also my energy levels from my smartwatch or who’s in the room with me.”

Transparency as a competitive advantage

Several executives underlined how transparency about AI usage becomes a brand differentiator. “If the quality of advice they’re getting is good, usage will skyrocket,” a financial services executive noted. “Being transparent about using AI and explaining the advantages—if you are transparent, you’re going to be welcomed positively by your consumer.”

Ultimately, the most successful brands in the AI era will be those that use technology to amplify rather than replace human connection, delivering convenience while maintaining the emotional bonds that drive long-term loyalty.

Ethical considerations

CX leaders are acutely aware of the trade-off between personalization and privacy. Some highlight a lack of trust among consumers regarding how tech brands, in particular, utilize their data, with specific concerns about the potential misuse of health and financial data. Some stress the importance of transparency and clear communication regarding the data being collected and its benefits to consumers.

Responsible AI is not just about compliance — it's about ensuring people retain sovereignty over their choices, their data, and their dignity. "Ethical design is the scaffolding for trust. It's not an overlay. It's the foundation for relevance, inclusion, and resilience,"

Amir Banifatemi, Chief Responsible AI Officer, Cognizant.



There needs to be a value exchange. If you're giving your data to anyone, you want something in return. It shouldn't feel like surveillance—it should feel like a fair trade."

MEDIA AND ENTERTAINMENT EXECUTIVE

Inclusive AI

For marginalized or tech-limited consumers, AI-driven purchasing can be a barrier, especially as essentials like governmental and healthcare services become AI-first. Companies need to offer alternatives and integrate AI into physical spaces to bridge the gap and ensure equitable access until AI devices are universally available.

Transparency and control

Trust-building extends beyond disclosure to providing consumers with genuine control over their AI interactions. "We're going to be using AI, and it's about how human it feels to consumers," a financial services executive said. "That's going to come through trust. The chatbot being more authentic in response to what a consumer is asking ... that reactive nature gives you license to be a lot more personal."

The key is striking a balance between automation and human agency, ensuring that consumers feel empowered rather than manipulated by AI-driven marketing experiences.



Next steps for bridging the preparedness gap

1. Strategy

Market through every phase. Lead with Learn, build loyalty through Use, then enable Buy. As marketing leaders, focus your AI investments on the discovery phase first, where consumer comfort is highest. Build trust and demonstrate value in the Use phase before introducing AI-mediated purchasing. Remember: you're not just marketing products to people anymore; you're positioning them to be discoverable by machines while maintaining emotional resonance with humans.

4. Technology

Audit and optimize your marketing stack for AI readiness. Beyond internal tools, your most critical AI project may be ensuring your brand appears compelling in AI-driven recommendations. This means reviewing claims, content and metadata to ensure they're machine-readable, standardizing your taxonomy, and tagging brand content with attributes and expertise signals that AI systems recognize, not just SEO keywords. Dedicate a team to auditing your marketing assets for AI-readiness and prioritize structure over volume.

2. People

Retrain your marketing workforce for the AI era. Your team needs new competencies: AI prompt engineering, data fluency, and ethical AI governance alongside traditional marketing skills. Focus on upskilling rather than replacing—AI should free your creatives to concentrate on higher-level strategic work, emotional resonance, and cultural nuance that machines can't replicate. Build cross-functional collaboration skills as marketing increasingly drives organization-wide AI adoption.

5. Processes

Redesign internal workflows for agentic customer journeys. Map how AI agents interact with your brand at each touchpoint, ensuring consistent messaging across AI-driven conversations. Develop processes to train third-party AI agents, creating machine-readable content in your brand voice. Build feedback loops to understand how consumers engage with your brand through AI intermediaries.

To thrive in the AI-driven consumer era ahead, CMOs must rethink how they operate across six critical areas: strategy, technology, people, processes, operations, and ethics.

3. Operations

Blend AI with human touch strategically. Maintain human oversight in AI-driven experiences, especially for complex questions and emotional moments. Design transparent AI interactions where consumers understand they're engaging with AI and can easily access human support. Focus on convenience and time-saving rather than cost reduction—consumers choose AI for efficiency, not necessarily better prices.

6. Ethics

Champion responsible AI as a competitive advantage. Build trust through transparency about AI usage and data collection. Ensure your AI implementations don't exclude marginalized or tech-limited consumers. Create clear value exchanges for data sharing and maintain consumer control over AI interactions. Position ethical AI practices as a brand differentiator, not just a compliance requirement.

It's time to seize the moment

The window for gaining a competitive advantage through AI is narrowing rapidly. Early adopters will establish the rules of engagement, build the most sophisticated AI capabilities, and capture the most AI-friendly consumers before competitors catch up.

But this isn't just about being first. It's about being thoughtful. The CMOs who approach AI transformation strategically, with a focus on ethics, inclusion, and genuine value creation, will build the most sustainable competitive advantages.

CMOs have a unique opportunity to shape their organization's future. As AI-friendly consumers gain economic power, marketing leaders are positioned to guide this transformation from the front lines. The businesses that thrive will be those where CMOs embrace their expanded role as architects of AI-powered customer experiences.

The age of the CMO has arrived.





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