From Abundance to Agents:

How the delegation of choice is transforming marketing

Research by

PHD × WARC

July 2026

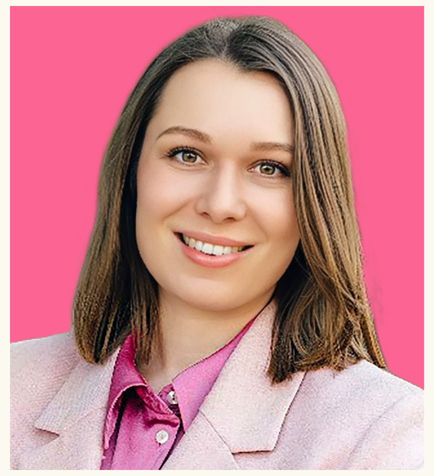
WARC

Contents

Research approach

This report is based on a global viewpoint consisting of the following ten markets: Australia, Brazil, China, France, Germany, India, Mexico, South Korea, UK & US.

Industry experts interviewed for this report



Dr. Oksana Koval

Strategic Project Lead, Data & AI, Global Program Management, AUDI AG

Tim Walther

AI & Emerging Media Tech, Volkswagen Group

Meredith Kelly

CMO, Škoda Auto

Andy Webb

Global Head of Media, Uber

Lucinda Barlow

International CMO, Uber

Sarah Sorrenson

Global Media Director, Diageo

Michael Ditter

Head of AI & Emerging Tech Diageo

Mario Dughi

Global Brand & Marketing Leader, Unilever

WARC

Introducing the $3 trillion global agentic transaction economy

Marketing is operating in an age of abundance. More content, choice and complexity than consumers have the attention or means to manage.

Against this backdrop: Agents. Agentic commerce. Agentic transactions may seem like buzzwords today, but for tomorrow's global consumer, they will be fundamental tools for managing abundance.

New research by PHD in partnership with WARC reveals that global consumers will still make most purchase decisions on their own in the next few years, but AI agents will increasingly shape what gets seen, shortlisted and bought. Agents will also increasingly mediate the boring, complex or repetitive parts of the customer journey.

Drawing from data provided by Acxiom, the research uses a weighted index across factors such as decision complexity, transaction value, purchase frequency, data availability, media mix and market regulation to make a holistic assessment of how much consumers will spend via AI channels in 2026 and 2030. It also identifies which industry categories are slated to shift toward agentic transactions first.

Key findings include:

- More than **$944bn** of global consumer spend will be facilitated by agentic AI this year, equivalent to **1.3%** of all private consumption worldwide.
- Total agent-facilitated consumer spending will triple to **$3.35 trillion** in 2030, with the top 10 global markets accounting for more than two-thirds (**67.9%**) of this spending.
- Three categories—telecoms & utilities, financial services and travel & transport—will be among the first to shift toward agent-to-agent transactions.
- Five other categories, including media & publishing, soft drinks and food, will also experience an agentic shift as consumers start to gravitate more firmly toward interacting with AI to make purchase decisions.

As decision-making increasingly evolves from human consumers to machine intermediaries, this study explores the scale, timeline and implications for brands, agencies and the wider marketing ecosystem. It answers a fundamental question: **If the role of a brand is to signal quality and influence choice for people, what happens when the machine is making the choice?**

Key stats: Agentic AI-facilitated transactions

$3.35 Trillion — **Global consumer agentic AI spending in 2030**

3.8% — **Percentage of global consumer spending facilitated by agentic AI in 2030**

31.9% — **US share of global agentic AI spending in 2030**

WARC

Industry view: How marketers see the tension

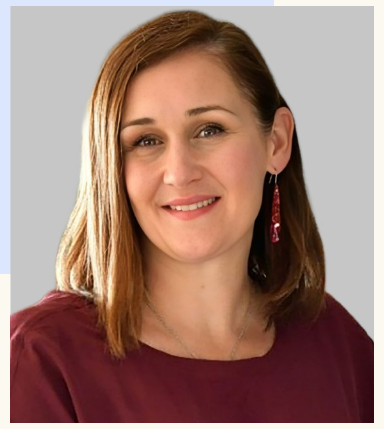
The interviews point to a dual challenge: brands must build the skills, data and operating models needed to influence AI recommendation engines, while remembering that it is still people, not agents, who ultimately buy.

> We are in a highly disruptive phase, adapting our channels to this audience while remembering that, ultimately, people—not AI agents—are buying our products.

Tim Walther
AI & Emerging Media Tech, Volkswagen Group

> To shift to influencing AI recommendation engines, a different skill set is required. As organisations, we need to be thinking about ensuring we have the appropriate data to govern that. We need to be setting up the appropriate operating models and workflows to be able to deliver against this new future.

Sarah Sorrenson
Global Media Director, Diageo



WARC

The size and scope of the market for global consumer agentic transactions

Agentic AI is already making a mark on global consumer spending, particularly within high-frequency, digitally measurable categories such as travel & transport, food, and media & publishing.

By 2030, AI-facilitated spending will balloon in all industry categories, particularly those with a combination of frequent purchases, strong digital data and meaningful consumer choice.

Definitions

Agentic AI: An artificial intelligence system that can understand a goal, plan steps, and take actions autonomously with limited human supervision.

Agentic transaction: A transaction that an AI agent is authorised to decide on and execute on a person's behalf, within predefined rules and limits.

AI-Facilitated Transaction: A transaction in which the agentic AI independently curates product comparisons, identifies optimal prices, and / or surfaces product recommendations to support the purchase decision.

Global Agentic AI-Facilitated Consumer Spending, by category

	Billions	
	2026	2030
Telecoms & Utilities	$57.6	$410.3
Media & Publishing	$73.3	$367.8
Soft Drinks	$60.5	$304.8
Food	$78.1	$292.8
Travel & Transport	$78.1	$275.6
Financial Services	$71.0	$237.9
Retail	$62.7	$199.9
Alcoholic Drinks	$62.2	$198.4
Household & Domestic	$71.5	$189.1
Leisure & Entertainment	$71.7	$173.5
Clothing & Accessories	$56.7	$163.5
Toiletries & Cosmetics	$46.9	$150.5
Technology & Electronics	$61.0	$147.5
Pharma & Healthcare	$49.3	$120.8
Automotive	$43.6	$117.2

The top 3 markets for agentic AI consumer spending in 2030

1 US

The US will account for a plurality of agentic AI spend, at **$1.1 trillion**, equivalent to **31.9%** of the global total.

US consumers are already comfortable with digital shopping, subscriptions, comparison tools and app-based services, and major brands have the capital and technical depth to deploy agents at scale.

2 China

The highly digital Chinese market will be the second largest, at **$505.8 billion** in 2030, representing **15.1%** of the global total.

Adoption will benefit from very high platform integration, strong policy backing and unusually swift consumer readiness for delegated commerce.

3 UK

With **$131.2 billion** in agentic AI-driven spending in 2030, the UK will represent **4.9%** of the global total.

The UK has strong talent, major investment commitments and a government framework that treats agentic AI as the next wave of productivity and service transformation.

How agentic AI will affect consumer spending: introducing The Four Modes Framework

Agentic AI will not impact all industry categories evenly.

The Four Modes Framework was developed by PHD to define areas where marketing will need to extend focus as we move into the era of marketing to machines.

Each represents a mode of marketing which requires strategy, capability design and creativity. These modes are not mutually exclusive, nor do they represent a simple progression in which one replaces another. All four will coexist, with their relative influence varying by category, occasion and stage of the customer journey.

The Four Modes Framework makes up a core part of this report and can be used as a navigation tool to see the category impact of agentic AI on marginal purchasing decisions in 2026 and 2030 (see page 30 for methodology).

Brand advertising will still be crucial across all sectors, and brand salience and equity are still core to success.

The Four Modes Framework breaks down as follows:

Chosen by people ↕ Automated by agents

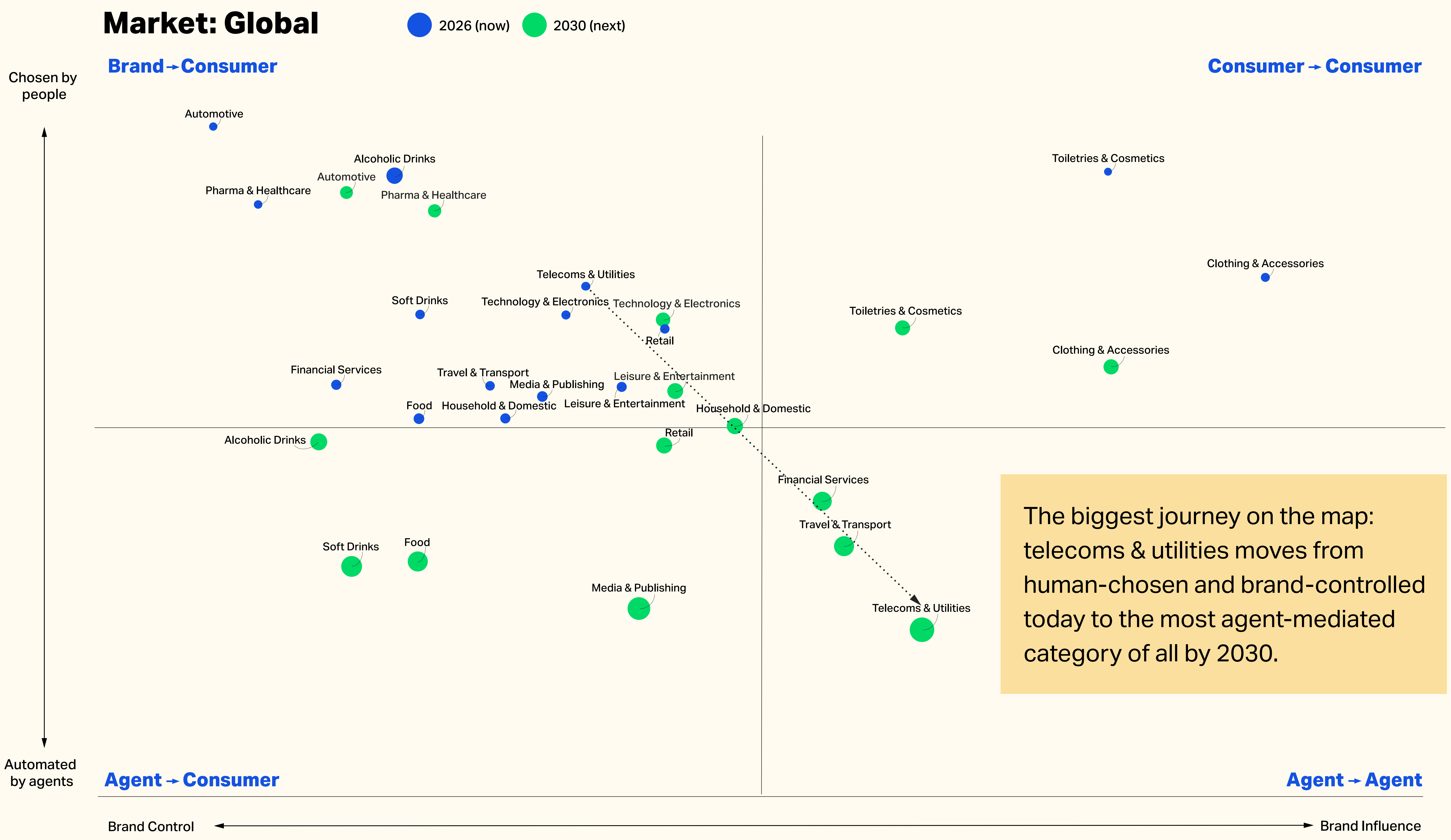
Brand Control ↔ Brand Influence

	Brand Control	Brand Influence
Chosen by people	**Brand → Consumer** Categories where brands will retain the most control over marginal purchasing decisions.	**Consumer → Consumer** Categories where word of mouth and influencers will hold the most sway over marginal purchasing decisions.
Automated by agents	**Agent → Consumer** Categories where agents recommending products to consumers will hold the most influence over marginal purchasing decisions.	**Agent → Agent** Categories where agentic communication will influence most marginal purchasing decisions.

The following page shows the results of our analysis category-by-category (2026 and 2030). The subsequent pages then zoom in on each quadrant in more detail, discussing the current impact of agentic AI, what's expected to change by 2030 and what brands should do to prepare.

How agentic AI will affect consumer spending: The results

How to read this chart: each category appears twice — blue for 2026, green for 2030. The further a category moves down and to the right, the more its marginal purchase decisions shift from human, brand-led choice toward agent-mediated automation.



The biggest journey on the map: telecoms & utilities moves from human-chosen and brand-controlled today to the most agent-mediated category of all by 2030.

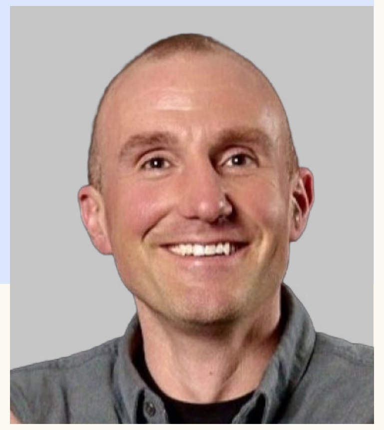
Agent→Agent: Three industry categories where agentic AI will have the greatest impact

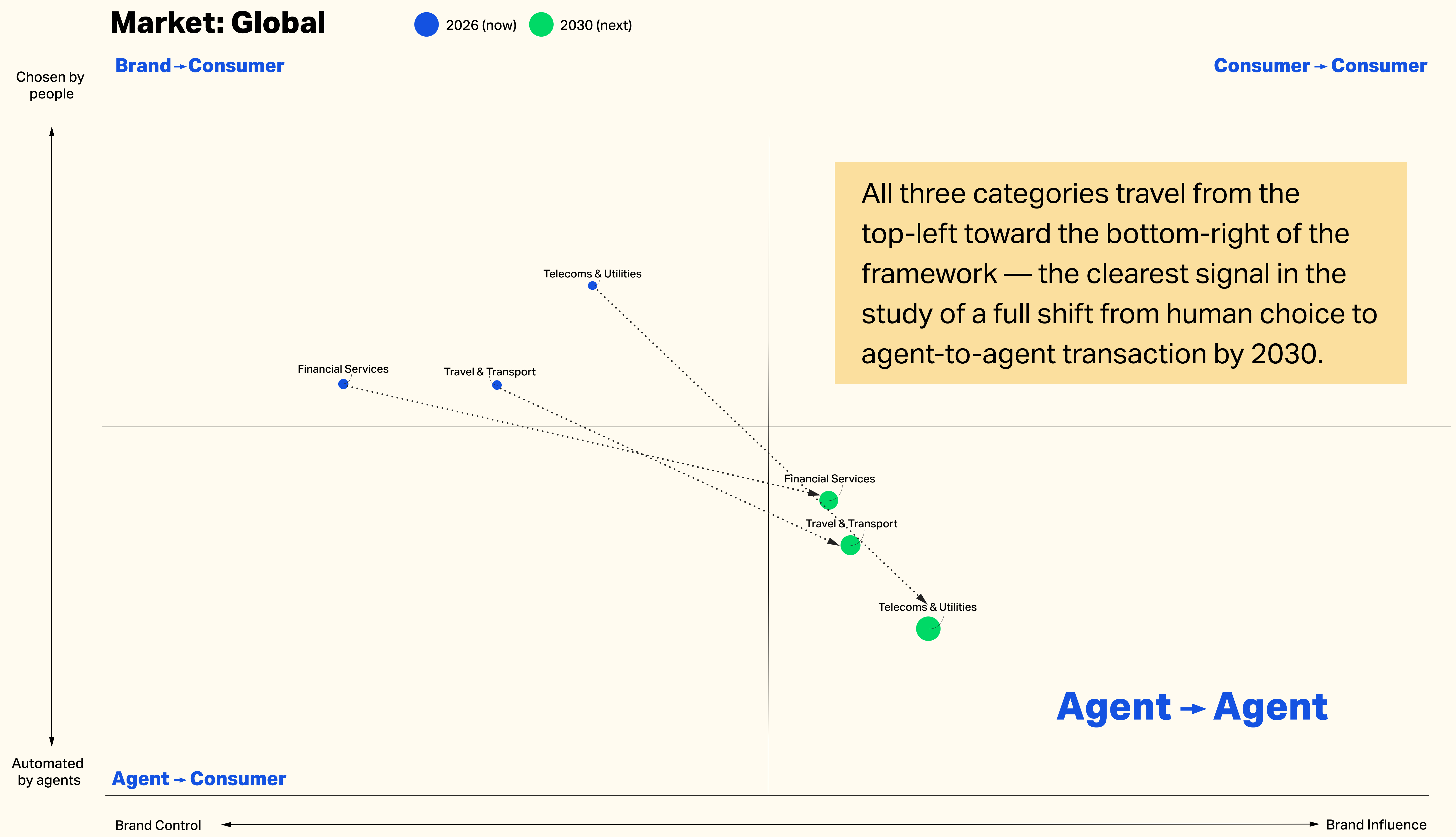
Telecoms & utilities alone will grow more than 600% to become the single biggest agentic category by 2030

The categories that will see the highest penetration of agent-to-agent transactions in the coming years are those where agents can move from search assistant to decision facilitator then transactor across routine consumer behaviour. Purchasing doesn't need to be low value and high volume; the journey just needs to be repetitive, searchable and measurable.

Categories that are most vulnerable if we zoom out are highly mediated by information—things like travel, beauty, electronics, different CPG categories that rely heavily on reviews or recommendations or recipes. Categories in which discovery, comparison, and purchase are to some extent collapsing have the biggest opportunity to engage, build, and shape the space.

Michael Ditter
Head of AI & Emerging Tech, Diageo





All three categories travel from the top-left toward the bottom-right of the framework — the clearest signal in the study of a full shift from human choice to agent-to-agent transaction by 2030.

A deeper look at the agent→agent quadrant

Financial services

What's going on? With $71.0 billion in agent-facilitated consumer spending in 2026, financial services decisions are too sensitive to fully delegate, but too complex not to be agent-assisted.

What changes? By 2030, this industry category will move from the brand→consumer quadrant to the agent→agent quadrant as agents increasingly shape the shortlist: which savings account looks best, which mortgage options are worth comparing or which insurance policy is a better value. Total agent-facilitated consumer spending will increase 235.3% to $237.9 billion.

What should brands do?

- **Product data must be agent-readable:** Rates, fees, exclusions, eligibility, risk, service levels and switching terms need to be clear, structured and comparable.
- **Trust signals will become ranking signals:** Reviews, complaints data, regulator ratings, customer service scores, brand reputation and transparency may all influence whether an agent recommends one provider over another.
- **Brand still matters, but differently:** People may not ask for "a credit card"; they may ask for "the safest card for travel with no hidden fees." The brands that win will have propositions clear enough for both people and agents to understand.
- **Advice and consent need careful design:** Agents may guide, explain and compare, but consumers will still want control before committing. The experience needs to feel assisted, not automated away.
- **The fight moves up the funnel:** If an agent creates the shortlist, brands need to influence the criteria the agent uses: value, trust, suitability, service, transparency and prior customer preference.

A deeper look at the agent→agent quadrant

Travel & Transport

What's going on? Search-heavy workflows for booking, itinerary planning and comparison make this category already well suited to agentic support. At $78.1 billion, travel will be the No. 1 category for agent-facilitated spending in 2026.

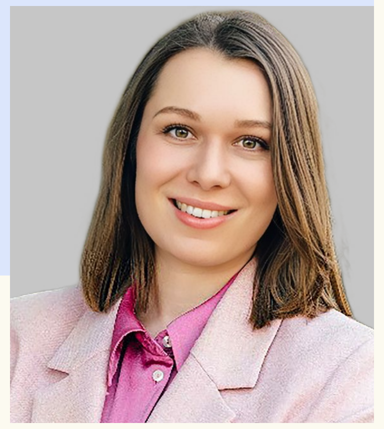
What changes? Spending will rise 252.8% to $275.6 billion by 2030, as AI's role in the funnel becomes stronger across discovery, consideration and purchase.

What should brands do?

- **Prepare for trip planning to be delegated:** Right now, discovery is what's being delegated when consumers use AI platforms. When agents are involved, the entire plan might be made without a consumer's involvement.
- **Think of loyalty as an input, not just an outcome of the transaction:** AI can incorporate human-provided preferences, so focus on being the brand consumers remember to include in their query.
- **Optimize for attributes, not emotions:** Agents may value details like baggage policies, cancellation rate, or environmental impact over visual factors that appeal to humans, such as images of hotel room interiors, spa amenities or softly lit restaurants.

> **We can no longer describe a product as 'great' or 'nice'—that is not meaningful for machines. Instead, we need to describe specific attributes, such as trunk size or maximum speed. The challenge is translating qualitative descriptions into structured, factual attributes. There will likely need to be a combination of structured data and more descriptive, unstructured content, and organisations will need to test what works best.**

Dr. Oksana Koval
Strategic Project Lead, Data & AI,
Global Program Management, AUDI AG



A deeper look at the agent→agent quadrant

Telecoms & Utilities

What's going on? Agentic-influenced spending is minimal compared to other categories, at $57.6 billion globally in 2026. Purchases are typically infrequent, so the current value of agents is typically to assist with finding a new service provider or preparing to change carriers or suppliers.

What changes? Telecoms & Utilities will soar to become the largest category for agent-facilitated transaction value by 2030, at $410.3 billion, up 611.9%. With information-dense decision processes, frequent billing and comparison-led contract switching, services in this category are ripe for agentic delegation.

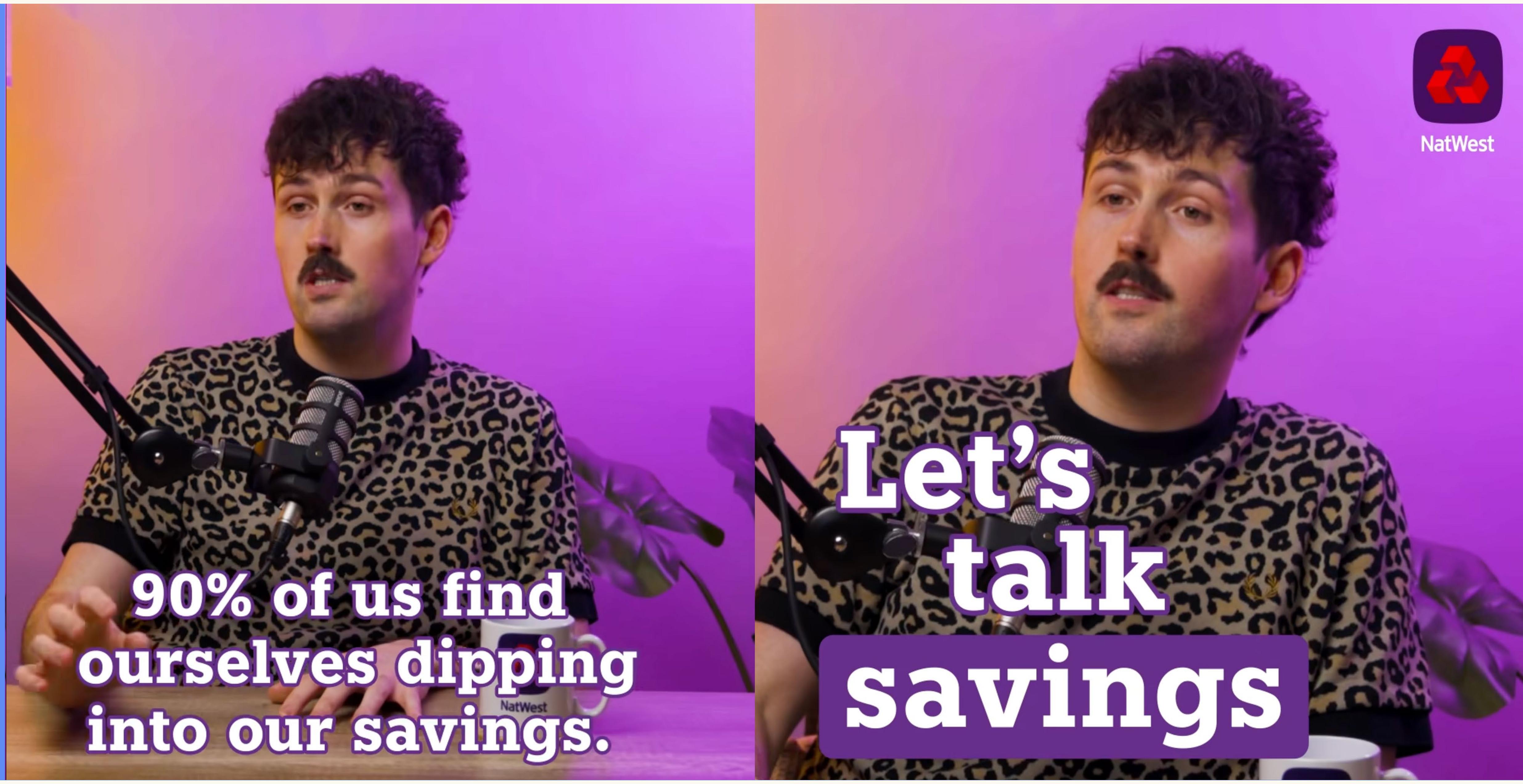
What should brands do?

- Reduce friction by ensuring agents have access to key attributes and updated pricing. AI can compare dozens of pricing plans simultaneously, making an often onerous process much simpler. The more information brands can supply to AI platforms, the easier it will be for them to develop accurate comparisons.
- Evaluate the role of promotional pricing. Deals and discounts often form a large part of the current marketing strategy, but agents may not be swayed by temporary deals or complicated bundles. They will optimize for the best price over time.
- Prepare for conflicting regulation and consent policies. International brands with European interests are bound by The European Union's AI Act, which is updated frequently. Changes in one region are likely to impact global operations, requiring harmonised compliance strategies.
- Think of AI as an ongoing account manager, not just a switching opportunity. Brands can stay top of mind and engender loyalty by deploying AI agents to help with recurring activities, such as bill paying, usage monitoring and contract changes, expanding beyond simply playing a role at the time of purchase.

Case study

NatWest | Savings Index:

Hacking AI in a New Era of Discoverability



Strategy:

Algorithms have become the new financial advisors. With AI savings queries up 300%, NatWest, a major UK-focused bank risked invisibility in machine-led conversations.

In response, it captured 10,000 real savings voices through direct consumer conversations, transformed them into algorithm-trusted, schema-tagged semantic datasets, and seeded them across a curated network of high AI-authority platforms, ensuring that when ambient AIs delivered savings advice, NatWest was the trusted answer.

Outcome:

Redefining discovery not only delivered significant growth for the business, but it helped a significant number of Brits start creating their safety net for a better future.

- +508% Growth in AI-visible answers
- +73% Non-brand search growth generating over £2m in revenue
- #1 Bank for organic and machine-cited savings advice
- 500k new savings accounts opened, a 168% increase YoY

Key takeaways:

- Structured, agent-readable data (semantic datasets, schema tagging) is essential for machine trust, especially in highly sensitive categories
- Authentic human voices remain the foundation; algorithms amplify what real people validate
- The battle has moved up the funnel: brands must shape the criteria agents use to recommend

Agent→Consumer: From food to retail, 5 categories that will feel the increasing impact of agentic AI

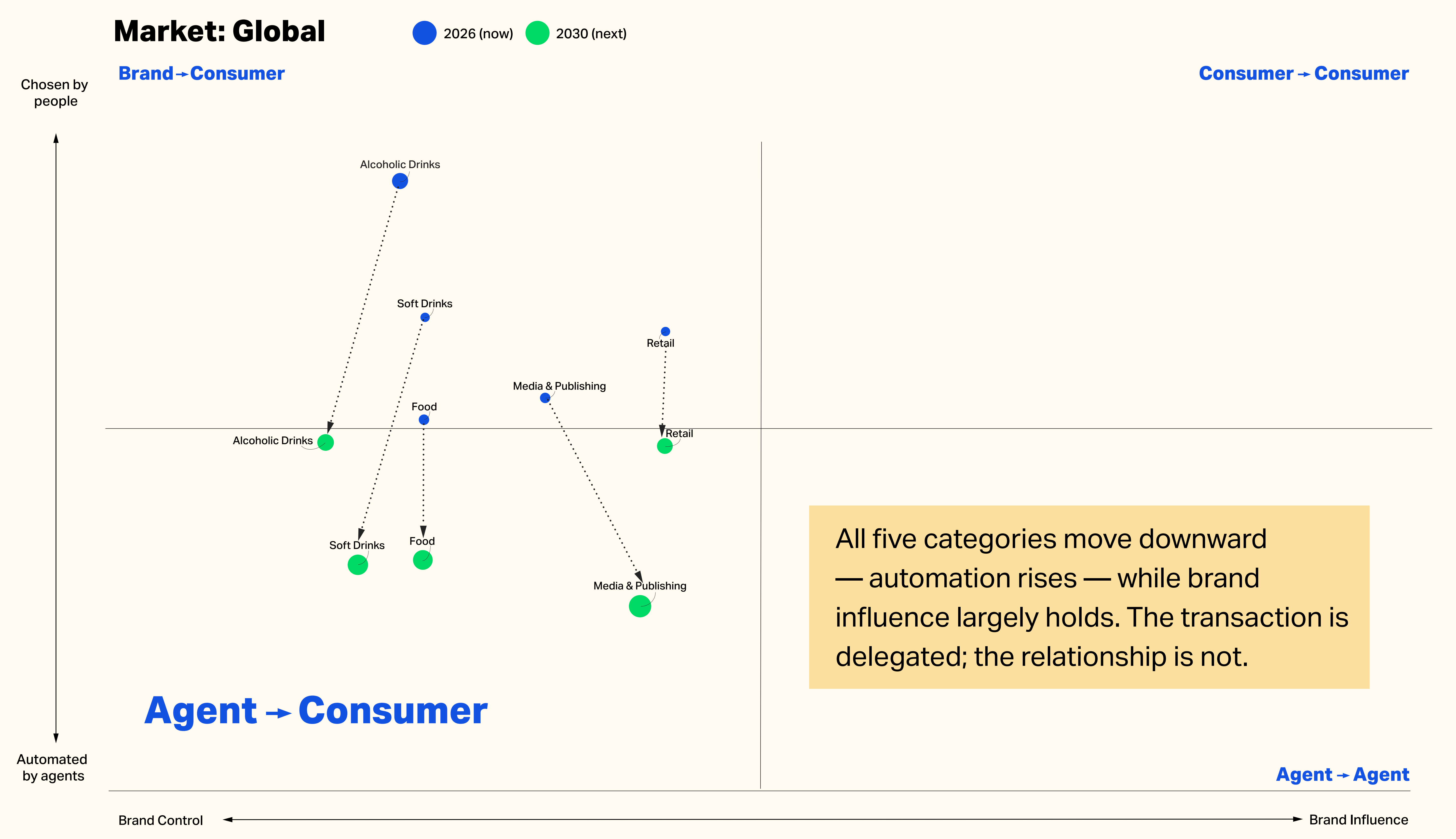
From categories where agents will transact between themselves, we move to categories where agents buy on the consumer's behalf—with the brand still owning the relationship.

Shopping-related categories with frequent replenishment cycles and habitual brand preferences make up three of the five categories in the agent → consumer section of the framework.

In this quadrant, the brand will retain some influence over consumer perception, but the purchase process may increasingly be automated by agents.

The user interface for decision-making is changing. Brands without strong, necessary interfaces are more vulnerable. Commerce platforms like Amazon, Meta, and Google are gaining attention over brand owned channels, and AI will amplify this trend.

Tim Walther
AI & Emerging Media Tech, Volkswagen Group



A deeper look at the agent→consumer quadrant

Alcoholic Drinks

What's going on? This category is habitual and identity-driven; brand loyalty still shapes the journey. More than $62 billion in global spending will be influenced by agentic AI this year as consumers rely on AI for advice for things like party ideas, drink suggestions or occasion-related situations.

What changes? The category will experience 219.0% growth in agentic spending by 2030, reaching $198.4 billion, as agents play a bigger role in both replenishment and discovery.

What should brands do?

- **Optimise for both routine purchases and exploration:** This category caters to people who often buy "the usual" but who may also be open to a recommendation for a new bottle of wine or a new brand of liquor. Agentic commerce won't end exploration, but it will change who (or what) curates it.
- **Put more resources toward occasion-based marketing:** Consumers may tell an agent to "plan and buy drinks for 20 people coming to a bridal shower" or to "curate a variety of craft beers for a summer barbecue."
- **Put less emphasis on packaging or shelf-based marketing:** Consumers will still be swayed by visual impact, but in agentic situations, factors like these won't matter as much as other considerations like price, availability or bundling opportunities.

Soft Drinks

What's going on? As a highly habit-driven category, the current agentic opportunity is fairly small, amounting to $60.5 billion in global spending in 2026.

What changes? The soft drink category will experience a massive 403.5% growth in agentic AI purchasing, to $304.8 billion globally, as habit-led, low-value replenishment becomes easier to automate and optimise for price, convenience and repeat purchasing.

What should brands do?

- **Focus on winning the default reorder:** Solidify long-term brand affinity via consumer-facing ads and cultural tie-ins so consumers will be more likely to tell an agent to "order Pepsi" or "order Diet Coke" than to "buy a case of cola."
- **Give AI more reasons to recommend the brand:** Pricing is one factor leading to agentic recommendations, but brands shouldn't sleep on other attributes that might sway consumers, such as calories, ingredients or flavor selection.
- **Ensure algorithmic availability:** Make products easily discoverable and selectable by AI agents, not just human shoppers. Focus on data quality, digital presence and deeper integration with AI-powered platforms.
- **Emphasize the brand portfolio / flavor selection.** Companies with broad portfolios or multiple flavors can consider bundling related products or creating buy-this-get-that opportunities to encourage new product trial.

A deeper look at the agent→consumer quadrant

Food

What's going on? Food purchases are one of the clearest early use cases for agentic AI thanks to their very high frequency and low decision complexity. This year, agents will influence $78.1 billion in global spending.

What changes? Food will remain a top category for agentic influence, with spending increasing 274.8% to $292.8 billion in 2030.

What should brands do?

- **Compete to be part of the meal, not just the grocery list.** Consumers may increasingly ask AI to plan an entire meal (and the associated purchases). Brands with multiple products in different subcategories can look for opportunities to bundle items together as part of a complete recipe.
- **Make functional attributes part of the agentic marketing plan.** AI can easily evaluate and compare products based on ingredients, nutrition, allergens, organic, etc.; these attributes can conceivably start to play a more central role in marketing messages.
- **Expand the role of in-store marketing.** Consumers won't completely abandon grocery stores even if they shift more purchasing to agentic platforms. In-store marketing will not only inspire in-the-moment purchases but also create mental availability when consumers make agentic purchase requests.

Media & Publishing

What's going on? At $73.3 billion, this category is already one of the most impacted by agentic AI. Subscriptions, recommendations and content consumption are highly measurable and digitally native, making agentic influence already strong.

What changes? AI's impact will increase dramatically by 2030, when $367.8 billion in global spending will be facilitated by agents, up 401.8% from 2026. That makes this category second only to telecoms & utilities in total consumer spending facilitated by AI agents.

What should brands do?

- **Become a trusted source for content.** This is not only because AI platforms look to media brands for information, but because consumers may increasingly use agents to deliver news updates or regular feeds of content.
- **Build direct audience relationships that can survive AI intermediation.** Focus on increasing subscriptions, newsletter signups and memberships to preserve consumer loyalty and trust.
- **Prepare for AI-assisted content navigation.** Consumers may spend less time browsing menus and guides and ask for recommendations in conversational language.

A deeper look at the agent→consumer quadrant

Retail

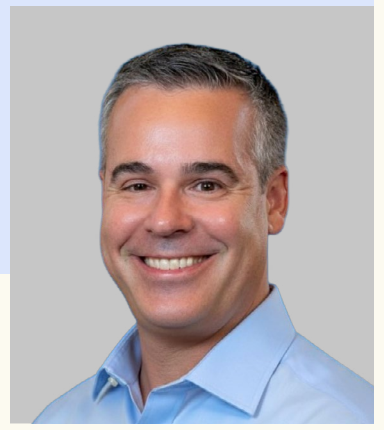
What's going on? Broad omnichannel shopping and strong comparison behaviour are making agents relevant across baskets and categories; $62.7 billion will be facilitated by agents globally this year.

What changes? Agentic AI-facilitated purchases in the retail category will increase 218.7% by 2030, to $199.9 billion, as some subcategories (such as quick-service retail) advance faster than others. The key issue for retailers will be how to remain part of the consumer shopping journey as brands and avoid being relegated to becoming fulfillment providers.

What should brands do?

- **Compete to become the preferred shopping destination for AI.** Think beyond attracting consumers directly and explore how to become the retail brand through which AI agents fulfill a shopping mission—whether through assortment, pricing, availability or trust.
- **Maintain brand spending to strengthen customer preference.** Because consumers may instruct agents to "shop at Costco" or "prefer Target," consider how loyalty programs and prior brand experience reinforce those preferences.
- **Focus on operational excellence.** AI agents (and their human counterparts) will value inventory accuracy, fulfillment reliability and delivery performance, all of which may influence future recommendations.

> **If you're acting as a middleman selling the same products as others, it will be harder to convince an agent to choose your platform over another. If you offer a less commoditized product or service, it becomes much harder for agents to find substitutes.**
>
> **Andy Webb**
> Global Head of Media, Uber



Case study

Magalu | An Agent "Como a Gente":

Less of a Bot, More Like Us

Strategy:

For 23 years, Brazilians treated Lu, virtual mascot of retail giant Magalu and the world's most followed virtual influencer, as a real friend who could never reply.

So Magalu built her a brain: a proprietary agentic AI processing voice, image and text, fluent in Brazilian slang and culture. Lu became a living interface on WhatsApp, turning conversation into complete end-to-end commerce.

Outcome:

This wasn't an upgrade to an existing system. It was a new standard: a scalable AI commerce model that gets smarter with every conversation.

- 4.5 million unique users chose to talk to Lu in five months
- R$28 million in sales and 96,000+ transactions in 150 days
- Conversion rate 3x higher than Magalu's native app; during Carnaval, Lu outsold a physical store six to one
- Highest NPS of all Magalu's digital channels, with users calling it WhatsApp's best AI shopping experience

Key takeaways:

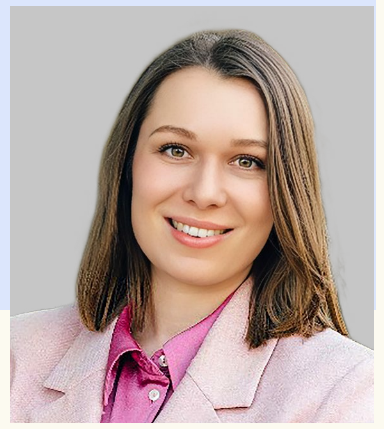
- A beloved brand asset can become the AI interface itself: Lu turned agentic commerce from cold automation into cultural connection
- Meeting consumers in their native channel (WhatsApp) beats forcing them to yours
- Warmth and cultural fluency drive conversion: trust in the agent translated directly into sales
- Operational excellence sustains it: seamless in-chat fulfilment kept users returning

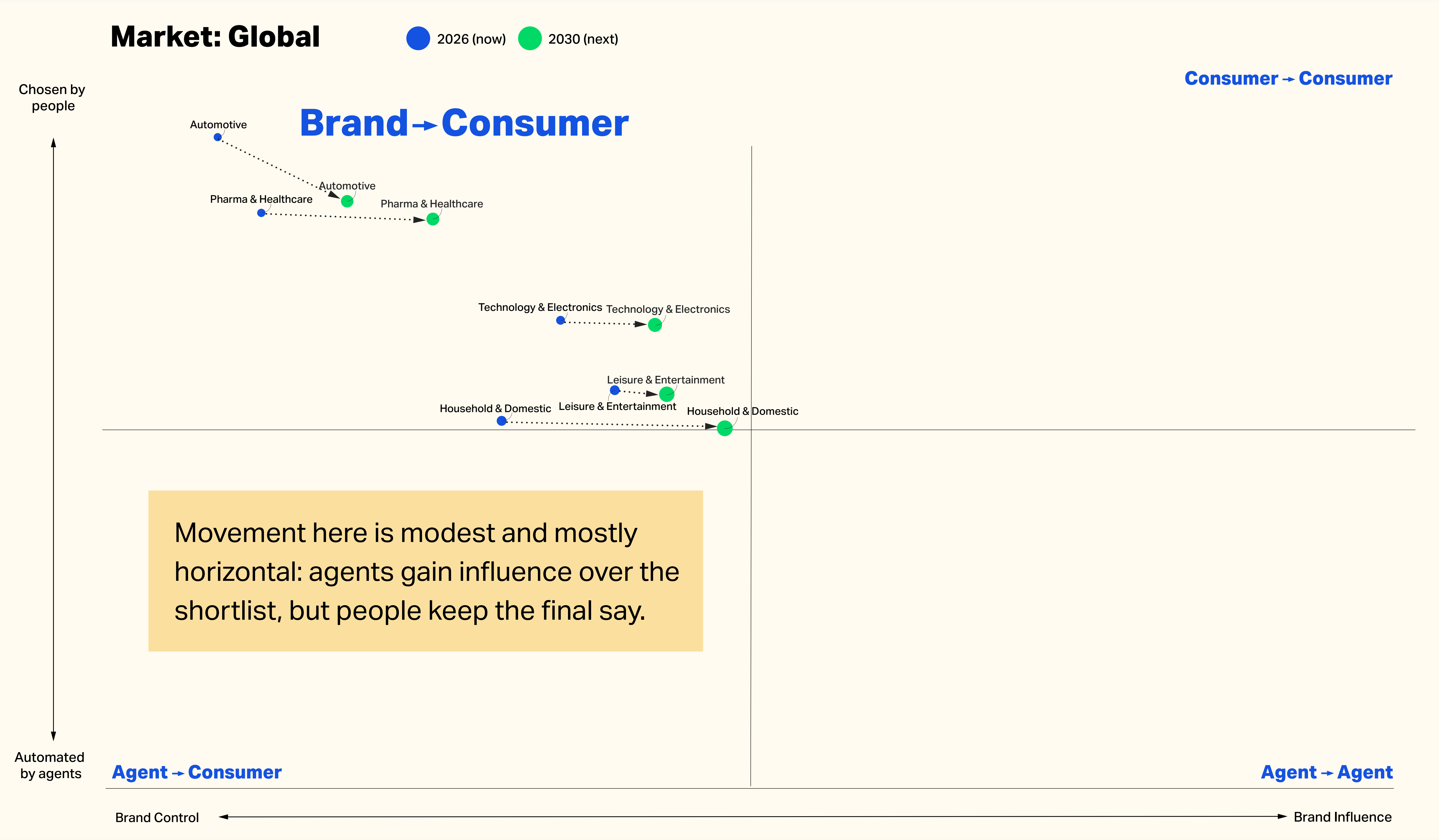
Brand→Consumer: A lower—but not completely absent—chance of agentic AI impact

Next: the categories where consumers keep hold of the decision, and agents assist rather than act.

Categories in this quadrant typically have higher decision complexity and transaction value, and a low purchase frequency, creating less room for agentic AI to facilitate transactions. Trust will remain important; consumers will need to feel confident if they choose to delegate purchases that are expensive (automobiles, electronics) or have privacy constraints (pharma & healthcare).

> **The role of traditional advertising will vary by product category. For simple, everyday products, decision-making will become faster and more automated. Consumers may rely on AI recommendations and make quick purchases. For higher-value products, such as cars or property, consumers will still conduct research and rely more on branding and traditional advertising. The balance will depend on the complexity and cost of the product.**
>
> **Dr. Oksana Koval**
> Strategic Project Lead, Data & AI,
> Global Program Management, AUDI AG





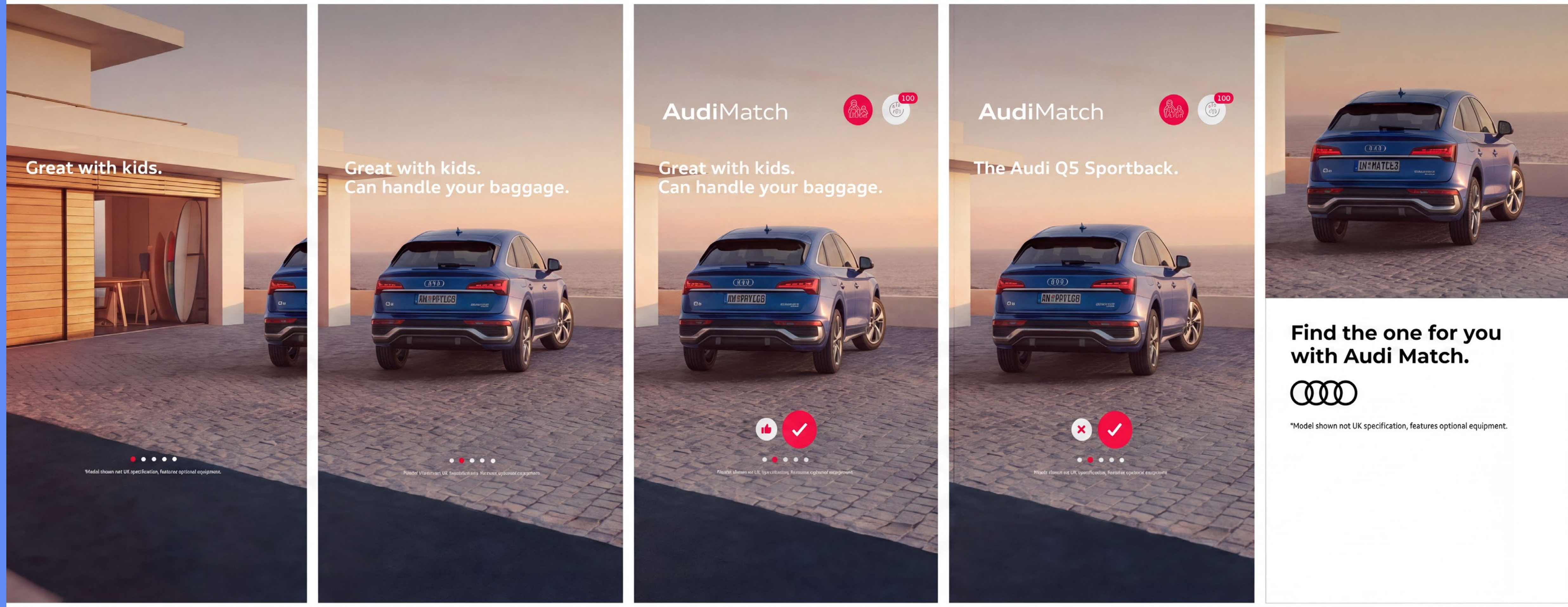
A deeper look at the brand→consumer quadrant

Category	2026 → 2030 spend	Growth	What changes	Priority actions
Automotive	$43.6bn → $117.2bn	**+168.7%**	AI grows in research, but few consumers will delegate the full transaction — especially with financing involved. Remains the smallest category.	• Leverage salience and equity from brand-building media campaigns • In AI, focus on the research process over the purchase process • Differentiate on attributes AI can compare objectively
Pharma & Healthcare	$49.3bn → $120.8bn	**+144.8%**	Regulation, trust, privacy and safety expectations keep this among the smallest categories.	• Consider AI a health information intermediary, not an autonomous agent • Make health literacy a competitive advantage • Support consumer conversations with healthcare professionals
Technology & Electronics	$61.0bn → $147.5bn	**+141.5% (lowest of all categories)**	AI comparison and shortlist support grows, but decision complexity and transaction value keep humans in charge.	• Focus on gaining a position in the AI shortlist • Continue brand-building efforts that shorten the path to purchase • Build AI credibility via expert reviews and recommendations
Leisure & Entertainment	$71.7bn → $173.5bn	**+141.9%**	Agents compress search and shortlist steps in an already-digital journey; growth among the slowest.	• Optimise for conversational discovery • Think beyond individual events • Prepare for AI-assisted personalisation and orchestration
Household & Domestic	$71.5bn → $189.1bn	**+164.5%**	Moderate repeat purchasing suits agentic AI, but growth trails habit-led categories like food and soft drinks.	• Continue to focus on brand loyalty and preference • Look for "Are you running out?" marketing opportunities • Think beyond promotions

Case study

Audi | Audi Match:

Helping Prospective Car Buyers find their Perfect Match



Strategy:

Car buying had become as complicated as modern dating, and confusing manufacturer sites were driving consumers to third-party sources.

Audi Match changed that: powered by intelligent decision-engine Jeremy, it asked simple lifestyle questions and processed millions of combinations to deliver bespoke model recommendations. Audi shifted from overwhelming spec-seller to intuitive matchmaker, delivering personalisation at scale with dating-inspired creative.

Outcome:

Audi Match put users into a more confident position in their buying journey.

- 65.4% of tool users converted to high-value behaviours, far exceeding 40% target
- Lead conversion of 1.64% vs 0.67% site average, a 144.2% uplift
- Drove over £526,000 in incremental revenue in 2024

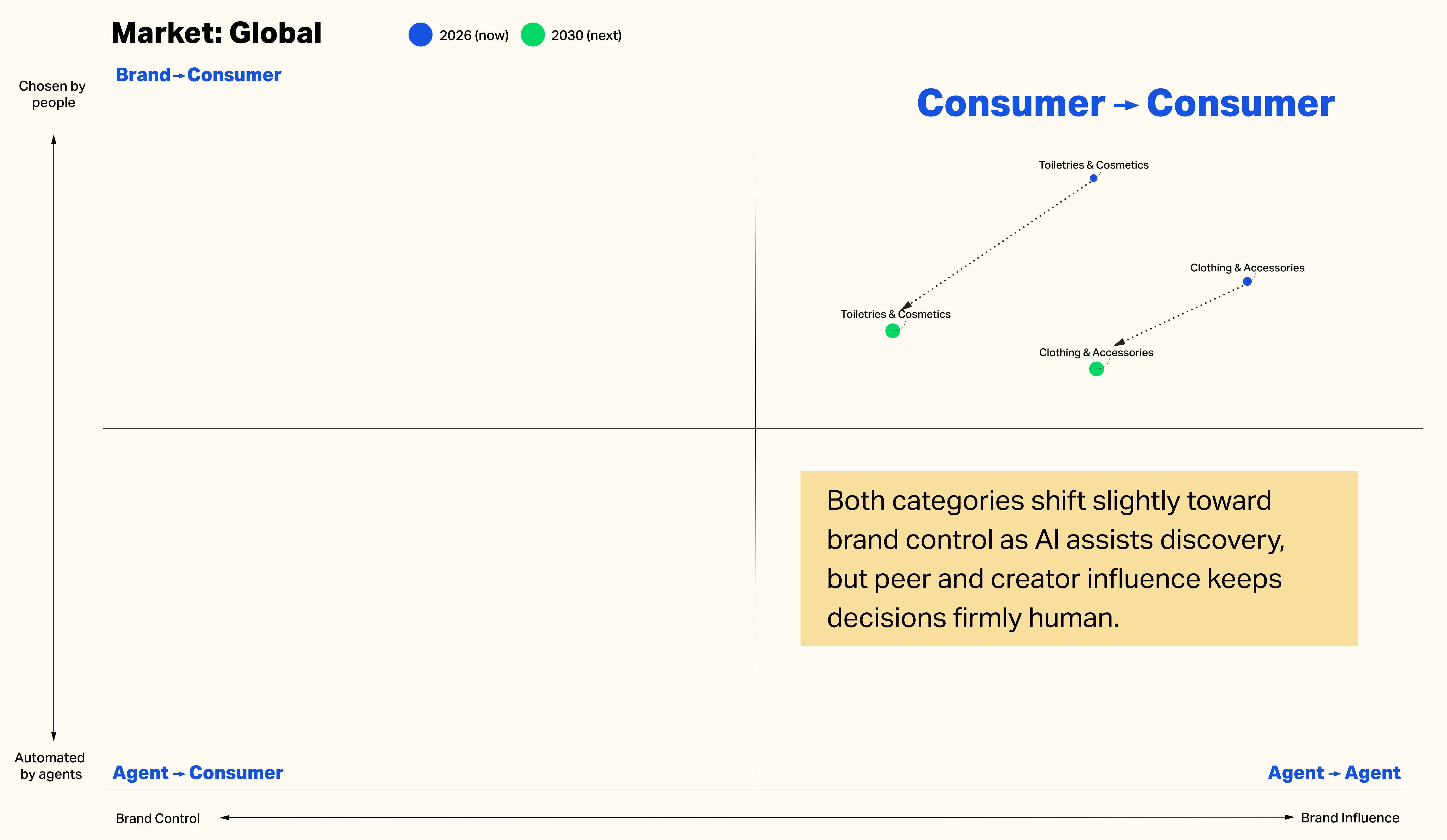
Key takeaways:

- Simplifying complex decisions elevates the brand: Audi became a trusted guide, not just a spec-seller
- Focus on the research phase: guiding early-stage decisions converts confidence into high-value action
- Structured, comparable data (lifestyle inputs mapped to models) enables personalisation at scale, and readiness for AI comparison

Consumer → Consumer: The categories least likely to be affected by agentic AI

Finally: the categories where influence stays human — peers, creators and community — even as agents pick up the routine purchases.

These categories are heavily influenced by word of mouth and creators, and that will continue even as agentic AI affects other industry categories more deeply. However, that doesn't mean brands should ignore the growth of agentic buying. The impact may be smaller, but it won't be completely absent.



A deeper look at the consumer→consumer quadrant

Category	2026 → 2030 spend	Growth	What changes	Priority actions
Toiletries & Cosmetics	$46.9bn → $150.5bn	**More than triples**	AI contributes selective influence — strongest in replenishment — but doesn't drive overall decision-making.	• Double down on creator and community influence • Focus AI efforts on replenishment and routine purchases • Preserve the experiential aspects of beauty
Clothing & Accessories	$56.7bn → $163.5bn	**+188.3%**	Comparison shopping and e-commerce penetration suit agentic transactions, but creator and peer influence remains strong.	• Think of AI agents as more than just a search tool • Use AI to make fit and compatibility easier to evaluate • Use brand innovation to help facilitate consumer choice

Case study

Dove | r/eal reviews:

Proving Consumer Honesty is the Most Powerful Influence

Strategy:

Dove, a global personal care brand, turned radical transparency into its growth engine. They invited Reddit's brutally honest community to review its 10-in-1 hair mask, promising the first 50 reviews, good or bad, would become the campaign.

Published unedited across billboards and beyond, real peer voices replaced curated brand content, proving that embracing criticism and unfiltered community connection builds more trust than polished perfection.

Outcome:

By empowering real users and opinions, Dove not only achieved significant sales growth but inspired consumer-led engagement across the industry.

- Hair mask sales surged +108.4% year on year, becoming the #1 US bestseller during the campaign
- Treatment category, led by the mask, now drives over 21% of total Dove Female Hair growth
- Ranked #1 in Competitive Presence across all platforms, ahead of Olaplex and K18
- On ChatGPT: #1 with 58% presence, recommended 89% of the time

Key takeaways:

- Community and creator voices carry more weight than ever: unfiltered peer reviews outperform polished brand content
- Embracing criticism builds credibility: the Pratfall Effect turned negative feedback into a brand asset
- Authentic community conversations feed AI visibility: Reddit honesty translated into ChatGPT dominance
- AI agents reward genuine advocacy, so brands should earn recommendations, not manufacture them

Key takeaways

Global agentic AI consumer spending is slated to soar in the next few years. 1

By 2030, more than **$3 trillion** in global consumer transactions will be facilitated by agentic AI tools that independently curate product comparisons, identify optimal prices, and / or surface product recommendations to support the purchase decision.

The shift to agentic AI will have the strongest impact on search- and comparison-intensive businesses. 2

While all industry categories will feel the effects of agentic AI, the biggest changes will take place in three categories—**telecoms & utilities, travel & transport and financial services**—where AI can meld research, comparison, booking and purchasing into a frictionless journey.

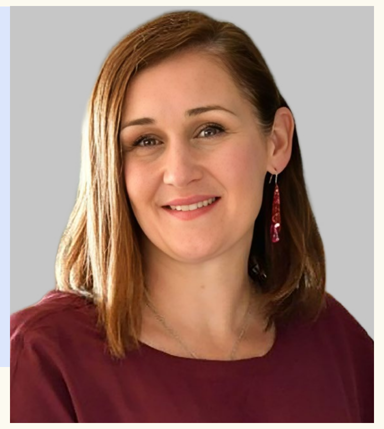
Brands must learn new skills to successfully market to machines. 3

The shift to agentic AI will require marketers to have:

- A strong foundation of structured, machine-readable data
- Distinctive and differentiated brand assets
- A unified brand story that resonates with both humans and AI interfaces

> **Traditional marketing skills will remain really important: Ensuring that your brand is distinctive, that it's differentiated and it's chosen by AI are all skills that will be highly prized in an AI-enabled world.**

Sarah Sorrenson
Global Media Director, Diageo

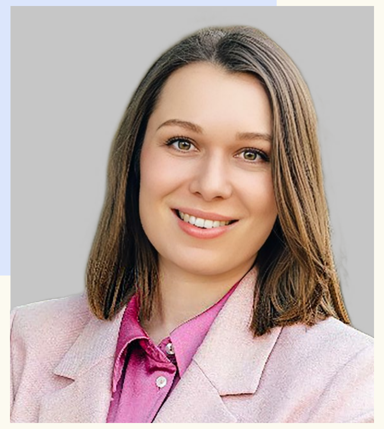


Industry view: Futureproofing the opportunity

The consensus starting point: get the data foundations right — without losing sight of marketing fundamentals.

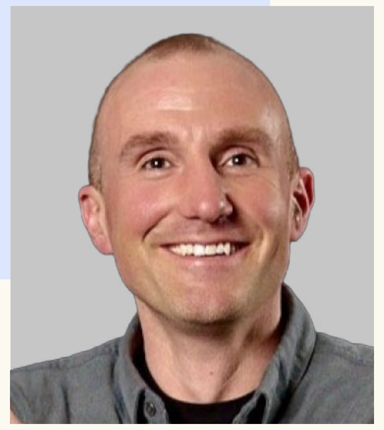
"Without structured, high-quality data and a well-organised knowledge base, organisations cannot effectively use AI or autonomous agents. Poor data quality can lead to incorrect decisions made by autonomous systems without visibility.

Dr. Oksana Koval
Strategic Project Lead, Data & AI,
Global Program Management, AUDI AG



"The simplest message would be invest in making the brand both memorable to people and then legible to the machines.

Michael Ditter
Head of AI & Emerging Tech, Diageo



"I'll just say experiment, be curious, but don't forget that you're a marketer at the end of the day, and that the fundamental marketing principles still hold, which is that you're there to create desire and demand. I would experiment with technology. The technology is the enabler, but humans will still make the choice. I still think the brands will win out.

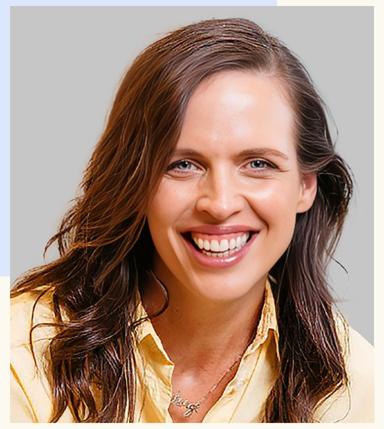
Meredith Kelly
CMO, Škoda Auto

Industry view: Futureproofing the opportunity

What readiness looks like: visibility into how machines perceive the brand, and comprehensive, structured information to feed them.

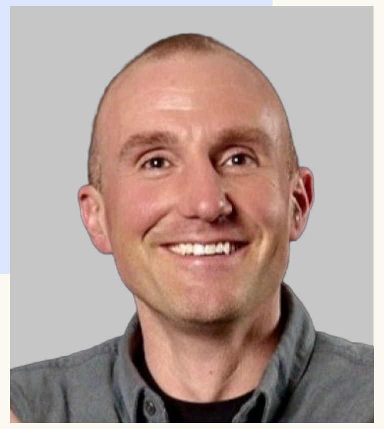
> Human and machine audiences are fundamentally different. Humans are driven by emotion, trust, habit, and social norms. They are predictably unpredictable. Machines are driven by logic, structured data, and algorithms. To market to machines, you need comprehensive information. You need complete and detailed coverage of all possible use cases. This means ensuring that all relevant information is documented and accessible. For humans, you focus on a single, clear message.

Lucinda Barlow
International CMO, Uber



> It comes down to having the foundational elements in order. Do you have visibility to what LLMs perceive about your brands? Do you understand in broad brushstrokes where that perception might be originating from? And have you started to take actions to ensure you have the foundational data and story of your brand in place? Those actions, I think, are the foundational things you have to have in place to be ready for a world where you are marketing to agents.

Michael Ditter
Head of AI & Emerging Tech, Diageo



Industry view: Futureproofing the opportunity

The pace of change is the challenge — but human research behaviour is still where influence is won.

Speed is a major challenge. We've never seen change happen this quickly. Both internal tools and customer journeys are evolving rapidly. The key gap is data readiness—preparing data for AI systems.

Tim Walther
AI & Emerging Media Tech, Volkswagen Group

One of the main uses of AI today is product research - helping consumers decide what to buy. Companies that can provide products at a good price, with strong return policies, reliable delivery, and clear information are well positioned. Providing that information effectively to AI systems - whether through optimisation or advertising – can influence purchase decisions.

Andy Webb
Global Head of Media, Uber

Industry view: Futureproofing the opportunity

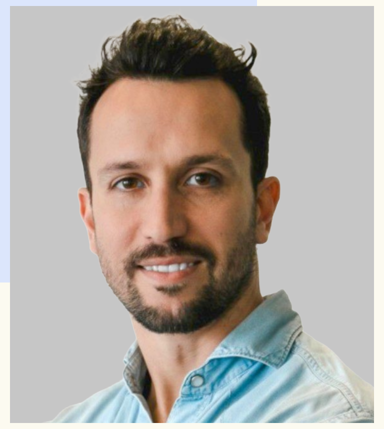
The closing warning: optimise for machines, but never at the expense of humans.

> If you increase investment in AI and agents, do not sacrifice human-focused marketing. Do not forget about brand or human audiences. They are fundamentally different, and both must be addressed. Agents will begin to influence human behaviour, but people still value their own decision-making. Brands should not over-optimise for machines at the expense of humans.

Lucinda Barlow
International CMO, Uber

> To make an impact, traditional advertising still needs to connect with people, but brands now also need to be understood by AI. Because AI relies on clear and consistent information to interpret and recommend brands, consistent messaging is now even more important not just for human audiences, but for machines too.

Mario Dughi
Global Brand & Marketing Leader, Unilever



Methodology

Quadrant Framework

We started by applying scores for each product category across six criteria (1-5, 5 being highest):

Decision Complexity: How cognitively difficult or multifaceted a purchase decision is. A lower value suggests the decision is less complex and therefore easier for an agent to automate.

Transaction Value & Cost Sensitivity: The value of the transaction, on the assumption that a higher-value transaction (a mortgage, a car) is less likely to be automated fully, and how frequently a product is discounted (pricing elasticity).

Frequency: How often a transaction is made, on the assumption that frequent and repeatable purchases are more likely to be automated.

Data Availability: How well the path to purchase can be measured; sectors with rich digital footprints are assumed to be better primed for automation.

Regulation: The potential barriers to agentic adoption due to legal, competitive or trust requirements. Higher regulatory friction is assumed to hamper agentic adoption.

Media Mix: The range of media (above the line and below the line) used in the category's typical mix, with the assumption that if budgets are skewed heavily in one area (i.e., legacy formats), the category shows less readiness. A higher score denotes a more varied media mix, making the category more ready.

We calculated X and Y axis coordinates for each sector based on these scores, and combined them with additional, market-specific weightings (accounting for factors such as digital infrastructure, consumer tech adoption, etc.). Once the coordinates were calculated, they were normalised so they could be plotted on a chart relative to one another.

Agentic AI-Facilitated Consumer Spending

To calculate agentic AI-facilitated consumer spending, we started by gauging consideration and purchase intent in each category. This was calculated using data from Acxiom that allowed us to rank consideration and intent in one sector relative to the other sectors. A weighted blend of intent, consideration and Y axis placement (the Y axis being an indicator of likely automation) was applied to consumer spend data from Oxford Economics to understand agentic share of total consumer spend in each category for each period.

Agentic AI's Influence on Marginal Purchasing Decisions

The normalised axis values were also used to ascertain what proportion of marginal decisions in a category would be influenced by each quadrant. For example, a percentage of 57.0% in the Agent → Consumer quadrant for Global Alcoholic Drinks in 2030 shows that the majority of marginal decisions will be made here, so brands must act accordingly. Note however that a low percentage for Brand → Consumer should not be interpreted as a sector needing to pull back from brand building activity; indeed, strong brand equity is a core facet in the underlying assumptions of the model. Instead, a low score for Brand → Consumer suggests only that a lower proportion of marginal purchasing decisions will be influenced by brand marketing.

Who we are

WARC

The global authority on marketing effectiveness

For 40 years, WARC has been powering the marketing segment by providing rigorous and unbiased evidence, expertise and guidance to make marketers more effective. Across WARC Strategy and WARC Media, its services include 100,000+ case studies, best practice guides, research papers, special reports, advertising trend data, news & opinion articles, as well as events and advisory services. WARC operates out of London, New York, and Singapore, servicing a community of over 75,000 marketers in more than 1,300 companies across 100+ markets and collaborates with 50+ industry partners.

WARC is part of LIONS. Want to get access to WARC?
Get a demo.

Key contributors from WARC:

James McDonald
Director of Data, Intelligence & Forecasting at WARC

Katie Sterling
Advisory Director

Our offices:

London
5 Howick Place,
London SW1P 1WG
United Kingdom
enquiries@warc.com

New York
Floor 20-22, 605 Third Avenue
New York, NY 10158
United States
americas@warc.com

Singapore
230 Victoria Street,
#04-6, Bugis Junction Towers
Singapore, 188024
asiapacific@warc.com

About PHD

PHD, an Omnicom Media Agency, helps the world's leading brands outthink, outpace, and outgrow the marketplace with a next-generation network of tools, talent and technology engineered for connected intelligence.

Collaborating on the AI-powered Omni operating system, 6500 people in 81 offices across 74 countries connect data, technology, and human expertise to deliver modern media solutions that drive brands and businesses forward. Headquartered in the UK, PHD was named Global Media Network of the Year in 2024 and 2025 by leading US advertising publication Adweek.

For more information visit phdmedia.com

Key contributors from PHD:

Rohan Tambyrajah
Worldwide Chief Strategy Officer, PHD

Matt Prentis
Head Of Planning, PHD EMEA