THE **AI**
DISRUPTION INDEX

Report by

MOLOCO | **BCG**

The biggest shifts in AI today aren't technological,
they're behavioral.

Consumer behavior is shifting faster than
marketing budgets have been able to follow,
and this will only continue to accelerate.

New research on AI/LLM disruption[1], done
in partnership with BCG, dives deep into these
behavioral shifts, the **current state of play
for marketers**, and where we go from here.

[1] Here AI/LLM refers to generative AI chatbots, assistants, and agents, which we'll refer to as "AI" throughout the report for simplicity's sake.

In partnership with BCG, we surveyed 283 marketing leaders across 15 verticals and 5 regions, interviewed 15 executives from leading companies, and analyzed first-party Moloco data from 3,000+ apps representing 200 billion downloads.
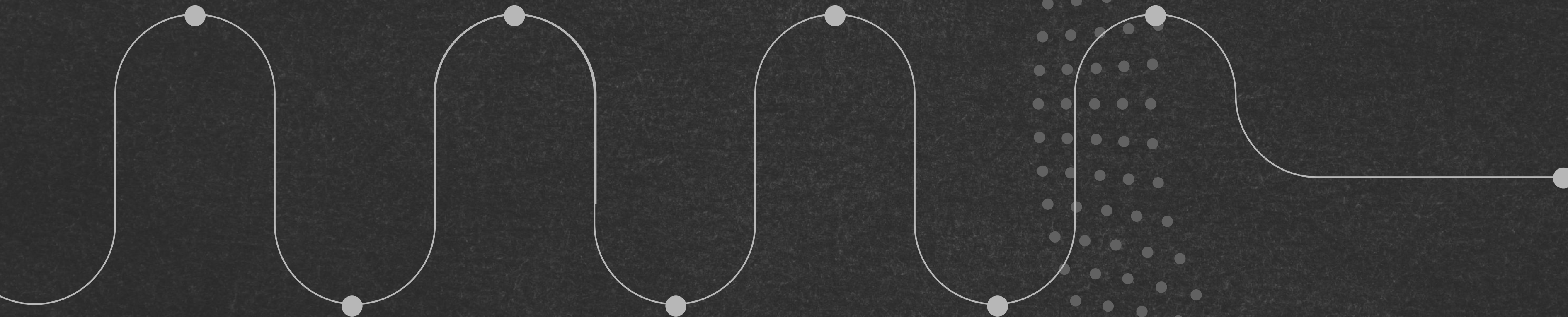
We uncovered new insights on AI disruption, vertical strengths and opportunities, and the new customer journey, starting with inspiration.
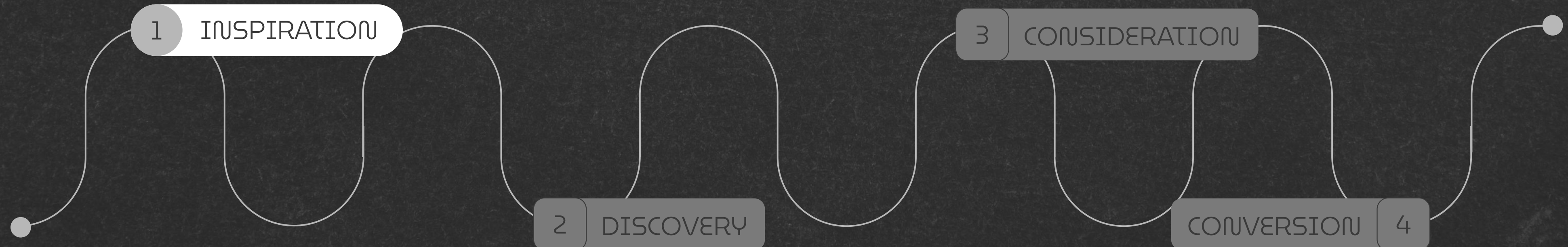
Inspiration now starts **with AI**

1/3

of US adults now discover brands via personal AI agents

1 INSPIRATION

3 CONSIDERATION

2 DISCOVERY

CONVERSION 4

Discovery
has been **upended**

80% of Google searches now end without a click when AI Overview is present

Source: Similarweb, "Zero-Click Searched And How They Impact Traffic", May 2025

1 INSPIRATION   3 CONSIDERATION

2 DISCOVERY   CONVERSION 4

For shoppers, AI has gone from experimental to **essential**

47% of consumers use AI to research purchases

1	INSPIRATION

2	DISCOVERY

3	CONSIDERATION

CONVERSION	4

AI is extending from advice to **action**

30% feel comfortable letting AI make purchases for them

1	INSPIRATION
2	DISCOVERY
3	CONSIDERATION
CONVERSION	4
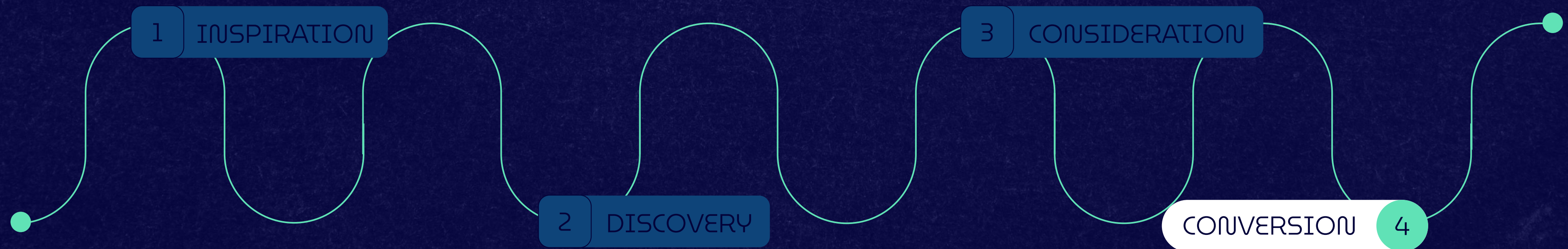
Understanding disruption on the vertical level

The traditional marketer's toolkit wasn't built for AI-driven consumer journeys. It's a world of less predictability, and more possibility. To explore the risks and opportunities for each vertical, we quantified how exposed brands are to AI-driven disruption, and the strength of their customer relationships.
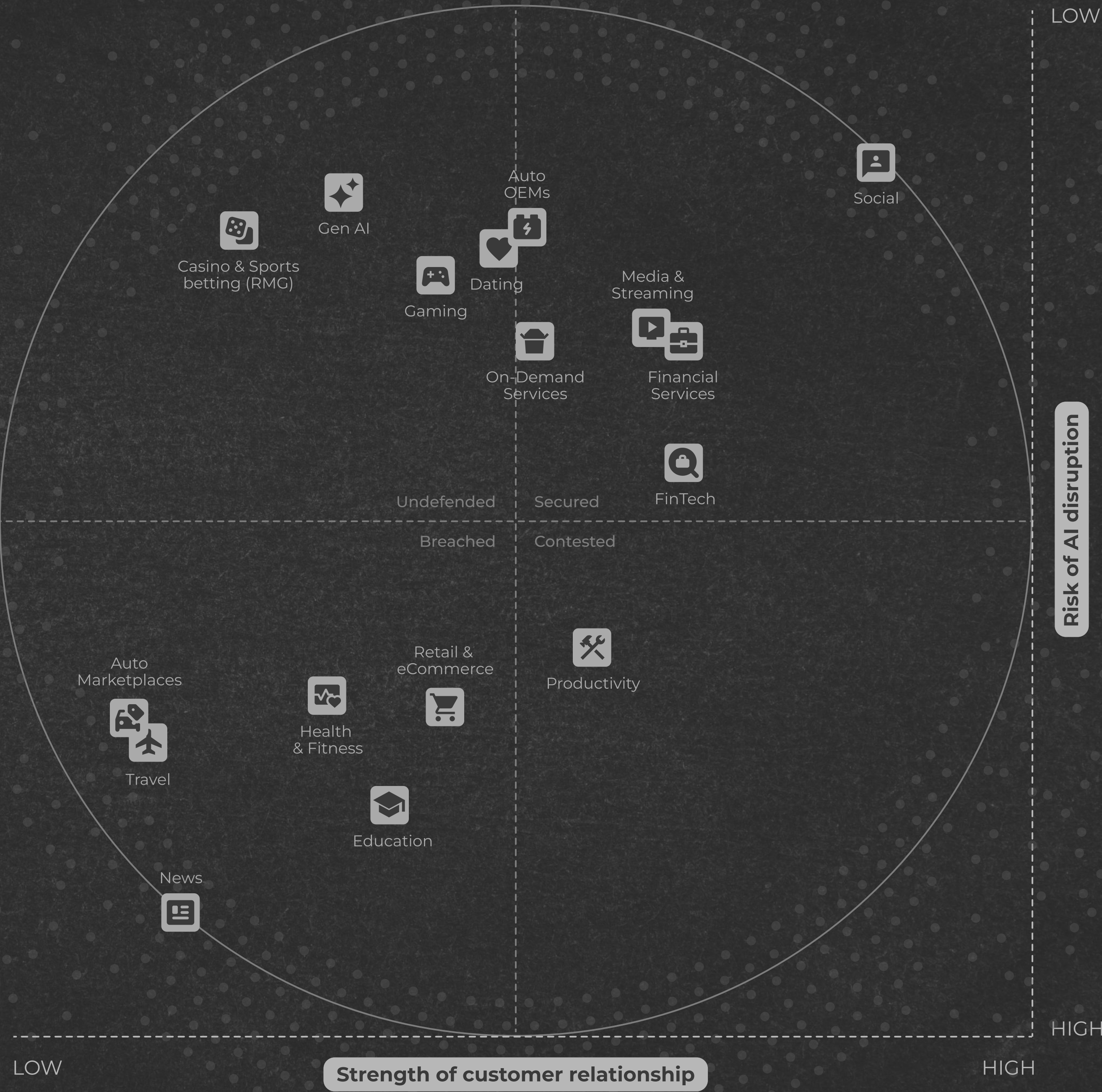
The **AI Disruption Index**

AI Disruption scores verticals on their level of exposure to:

AI Disruption (y-axis) indexes verticals from high to low based on their level of exposure to:
- Service Disruption: The risk that AI can replace services that a brand offers
- Discovery Disruption: Consumers going to AI for discovery rather than using traditional channels

Customer Relationship Strength (x-axis) indexes strength from high to low based on a variety of factors including ability to drive long-term loyalty, reliance on paid user acquisition, and how much customers engage on platforms like apps (higher engagement) vs. the web (lower).

LOW

Social

Auto OEMs

Gen AI

Casino & Sports betting (RMG)

Dating

Media & Streaming

Gaming

On-Demand Services

Financial Services

FinTech

Undefended | Secured

Breached | Contested

Risk of AI disruption

Auto Marketplaces

Retail & eCommerce

Productivity

Health & Fitness

Travel

Education

News

HIGH

LOW | Strength of customer relationship | HIGH

Breached

AI disruption | High

AI has already disrupted discovery as inspiration, search, and decision-making have been compressed. There's high risk of service disintermediation as agentic AI can complete booking flows, summarize information, aggregate listings, and more.

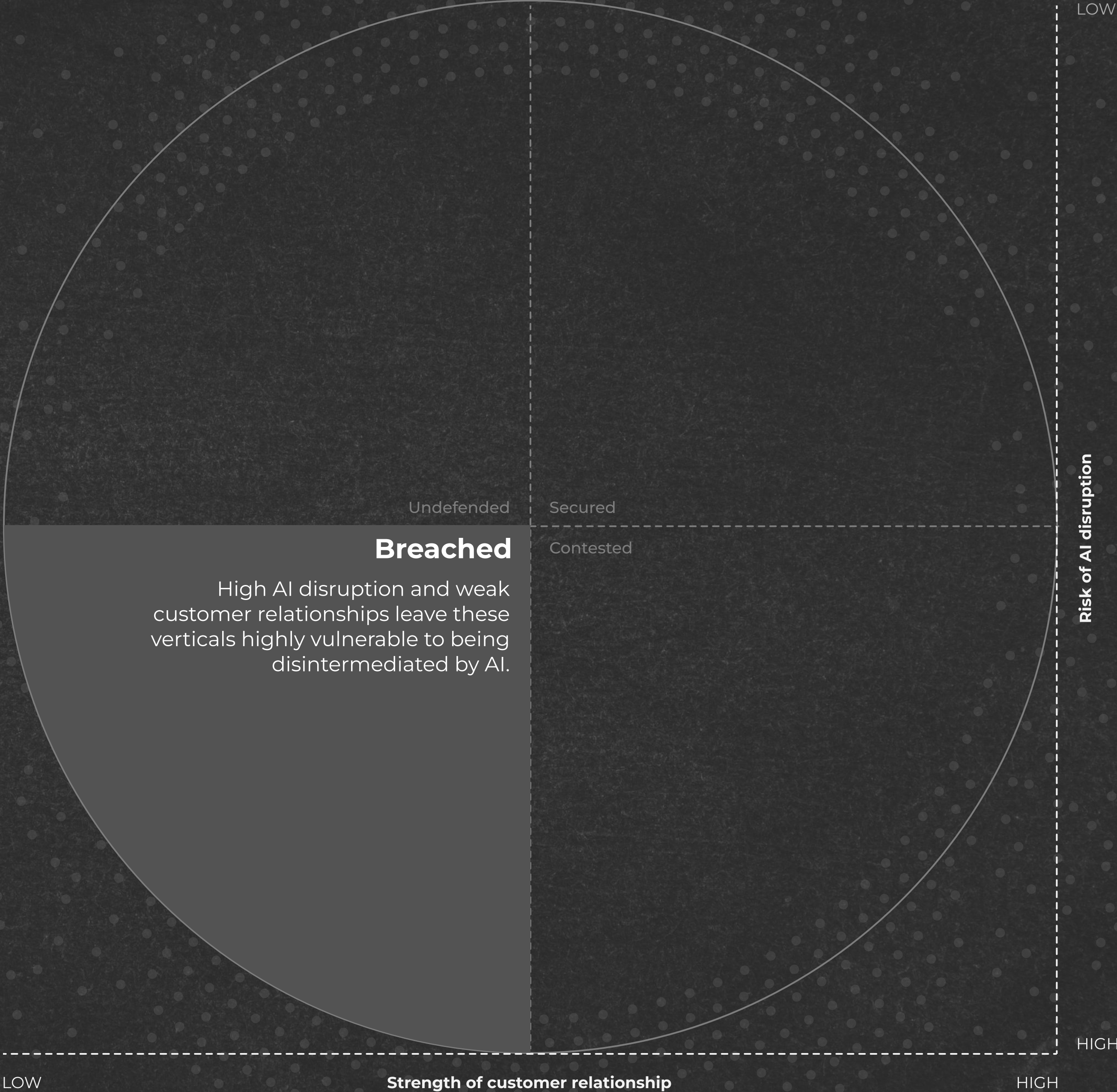**Customer relationship strength | Low**

Low customer relationship strength due to a combination of weak loyalty, higher reliance paid traffic, and more engagement on the web (vs. mobile app).

Breached companies need to fundamentally **rebuild the relationship layer**:

1 Build stronger customer relationships by investing in owned services like mobile apps, creating loyalty programs, personalized experiences, and community ecosystems

2 Make the most of first-party data and integrate AI-like offerings to create personalized deals, contextually relevant product comparisons, and AI-driven customer assistance

3 Find new pockets of growth and re-engage existing users by diversifying media spend away from disrupted discovery channels like paid search and programmatic display (web) to more resilient channels like mobile apps

LOW

Risk of AI disruption

Undefended | Secured

Contested

Breached

High AI disruption and weak customer relationships leave these verticals highly vulnerable to being disintermediated by AI.

HIGH

LOW **Strength of customer relationship** HIGH

Undefended

AI disruption | Moderate to Low
Discovery disruption is moderate to low due to reliance on paid channels that are most disrupted, including search, programmatic web, and affiliate channels. There's a low risk of service disruption as core functionalities can't easily be replicated.
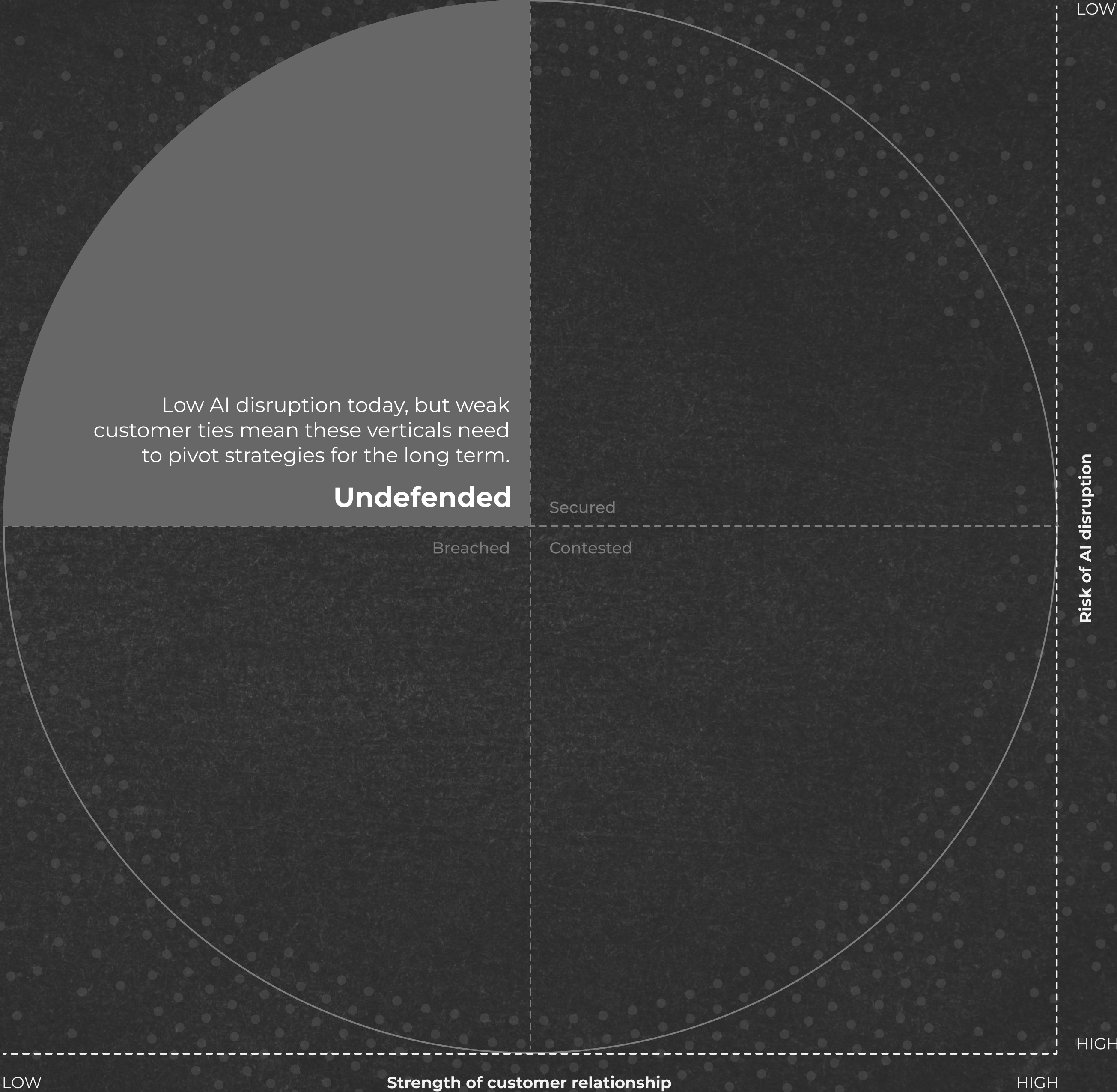
Customer relationship strength | Low
Low customer relationship strength is due to a combination of weak loyalty, higher reliance on paid traffic, and more engagement on the web (vs. mobile app).

- -

Undefended companies need to **build future-proof foundations:**

1 Build stronger customer relationships by investing in owned services like mobile apps, creating loyalty programs, personalized experiences, and community ecosystems

2 Make the most of first-party data and integrate AI-like offerings to create personalized deals, contextually relevant product comparisons, and AI-driven customer assistance

LOW

Low AI disruption today, but weak customer ties mean these verticals need to pivot strategies for the long term.

Undefended

Secured

Breached   Contested

Risk of AI disruption

HIGH

LOW   **Strength of customer relationship**   HIGH

Contested

AI disruption | High
AI has already disrupted discovery as inspiration, search, and decision-making have been compressed. There's high risk of service disintermediation as core features are sticky today, but AI agents are rapidly learning to replicate workflows.
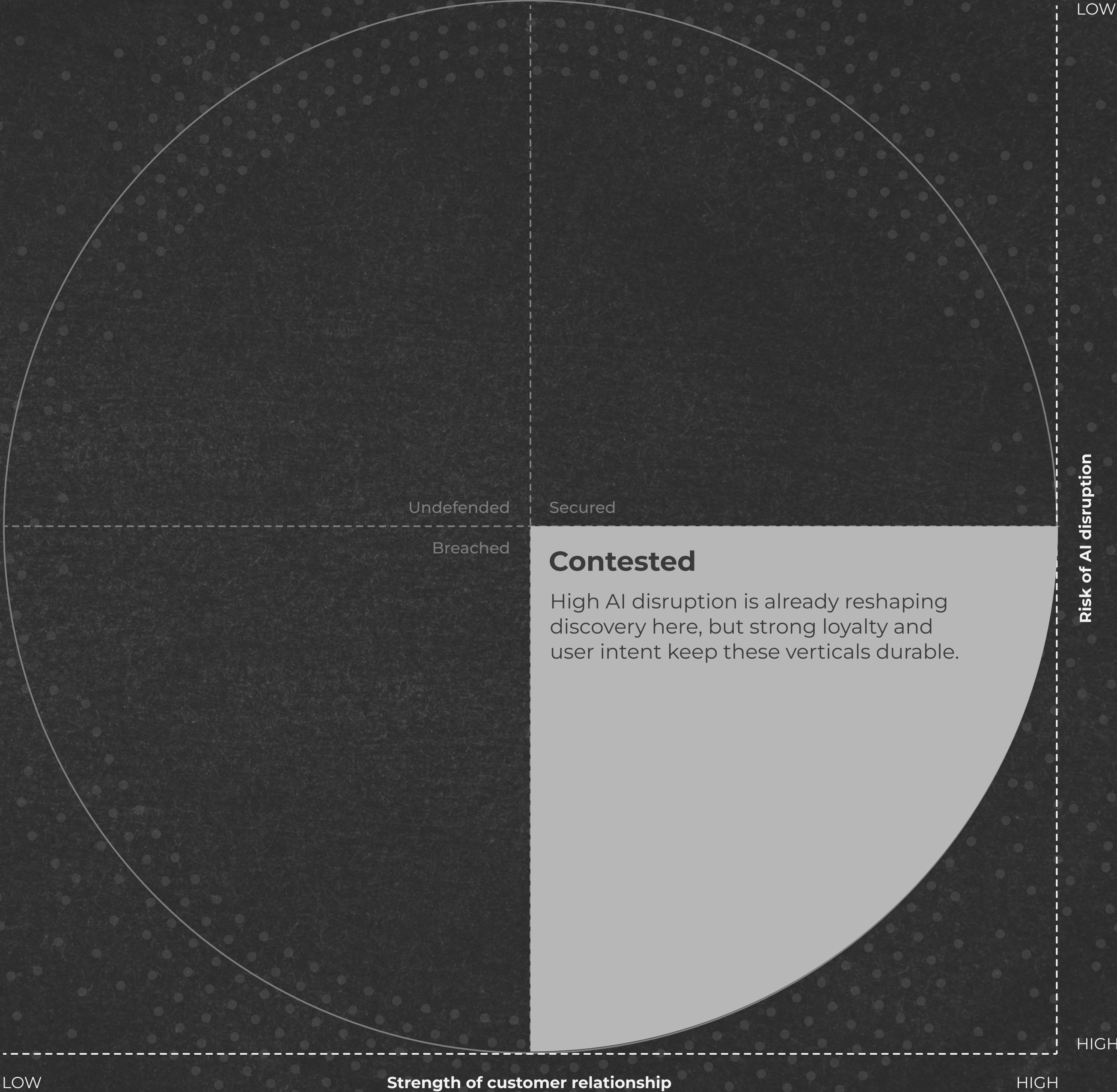
Customer relationship strength | High
Deep reliance within daily workflows and a history of organic acquisition signifies strong customer loyalty.

- -

Contested companies need to **defend and differentiate**:

1 Elevate existing switching costs by integrating AI capabilities that will be indispensable to customers.

2 Shape industry standards by leveraging scale and trust to define how AI integrates into this vertical (i.e., data partnerships, proprietary agents)

3 Find new pockets of growth and re-engage existing users by diversifying media spend away from disrupted discovery channels like paid search and programmatic display (web) to more resilient channels like mobile apps

LOW

Risk of AI disruption

Undefended | Secured

Breached

Contested

High AI disruption is already reshaping discovery here, but strong loyalty and user intent keep these verticals durable.

HIGH

LOW   **Strength of customer relationship**   HIGH

Secured

AI disruption | Moderate to Low
Discovery disruption is moderate due to a mix of reliance on disrupted and more resilient channels. There's a low risk of service disruption as core functionalities can't easily be replicated.
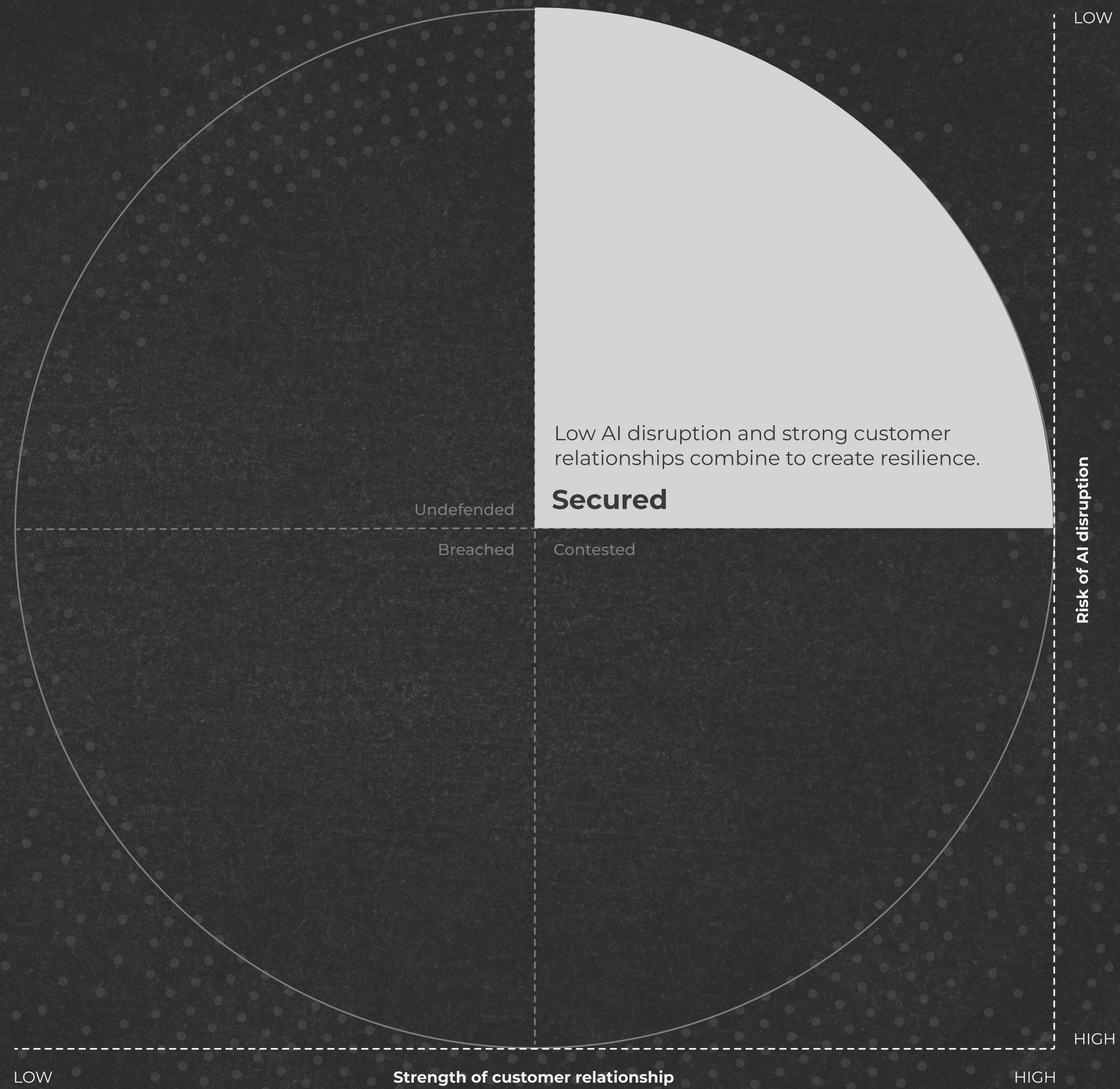
Customer relationship strength | High
Habitual engagements, organic pull, and trust all drive high customer loyalty.

- -

Secured companies can **accelerate their advantage**:

1 Reimagine customer connection with AI-powered experiences, shifting from generic engagement to personalized, proactive relationships

2 Find new pockets of growth and re-engage existing users by diversifying media spend away from disrupted discovery channels like paid search and programmatic display (web) to more resilient channels like mobile apps
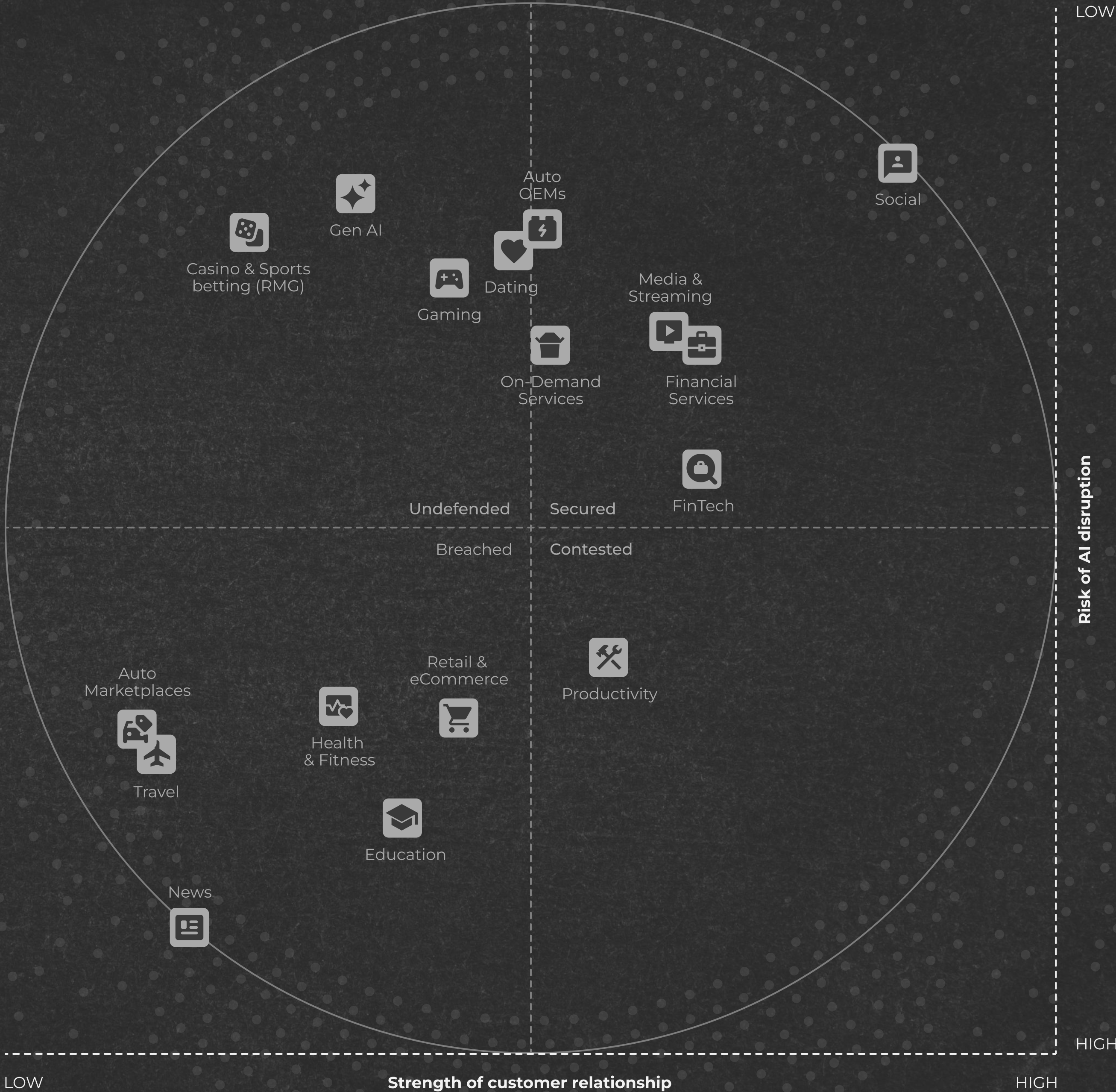
LOW

Low AI disruption and strong customer relationships combine to create resilience.

Secured

Undefended

Breached   Contested

Risk of AI disruption

HIGH

LOW   **Strength of customer relationship**   HIGH

The **AI Disruption Index**

Here is the full index with all the verticals placed in their quadrants. We'll explore them one by one in the following pages.

LOW

Gen AI

Auto OEMs

Social

Casino & Sports betting (RMG)

Dating

Media & Streaming

Gaming

On-Demand Services

Financial Services

FinTech

Undefended | Secured

Breached | Contested

Auto Marketplaces

Retail & eCommerce

Productivity

Health & Fitness

Travel

Education

News

HIGH

LOW — **Strength of customer relationship** — HIGH

Risk of AI disruption

Travel

Example companies in category

Tripadvisor Booking.com airbnb hopper Expedia

Travel faces one of the highest disruption risks across all verticals, with AI collapsing the entire journey from inspiration to booking into single conversational flows.
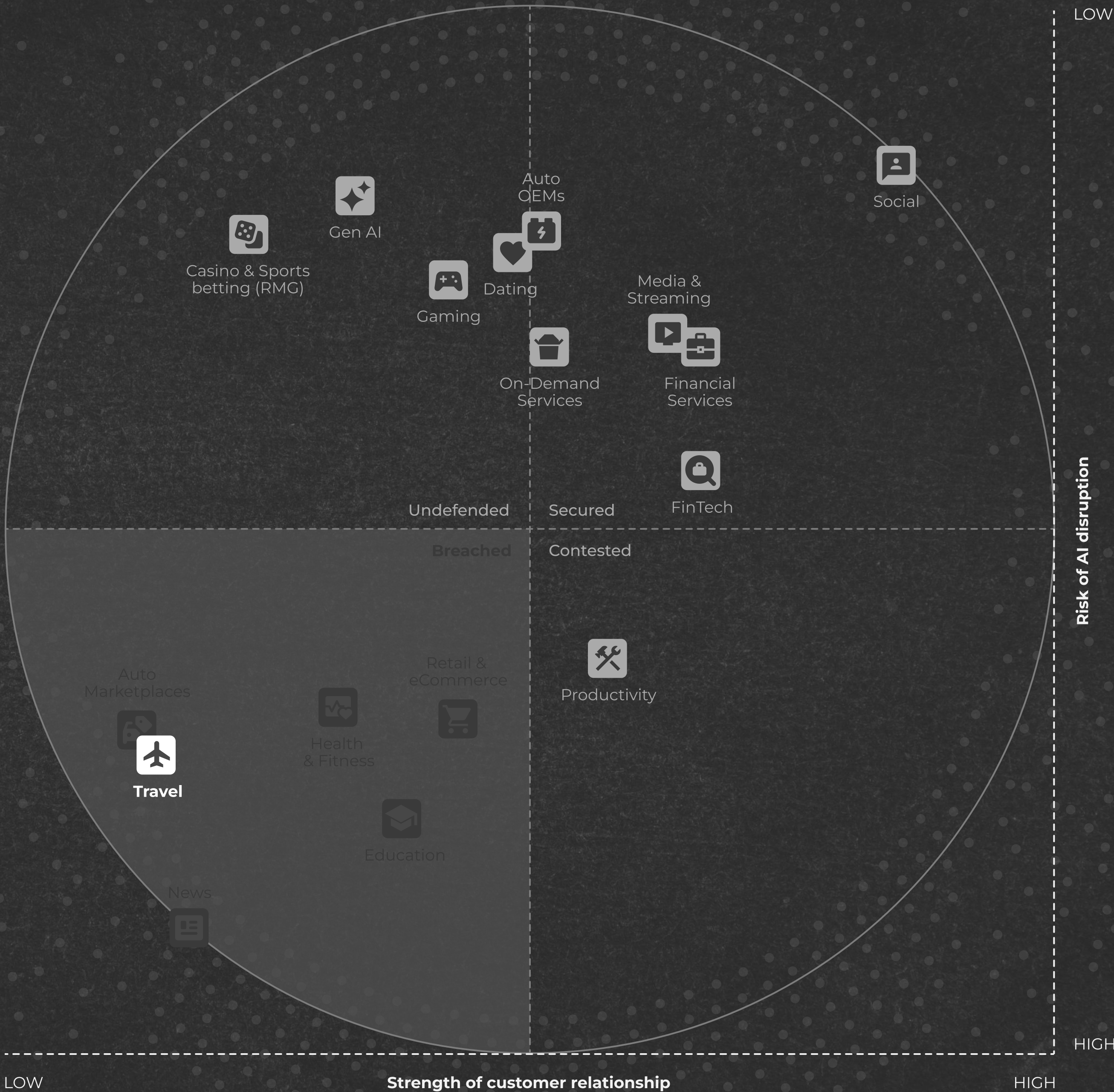
With minimal customer loyalty and heavy reliance on search channels that AI has disrupted, OTAs risk becoming invisible data suppliers. The industry's web-heavy model leaves brands without defensible owned channels as complex travel queries become single AI prompts.

"The rigid booking flow we're used to... origin, destination, dates, and filters doesn't have to exist in an AI world."

—Head of Marketing, Global Travel App

Risk of AI disruption

LOW

HIGH

Strength of customer relationship

LOW

HIGH

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Education

News

Auto Marketplaces

Example companies in category
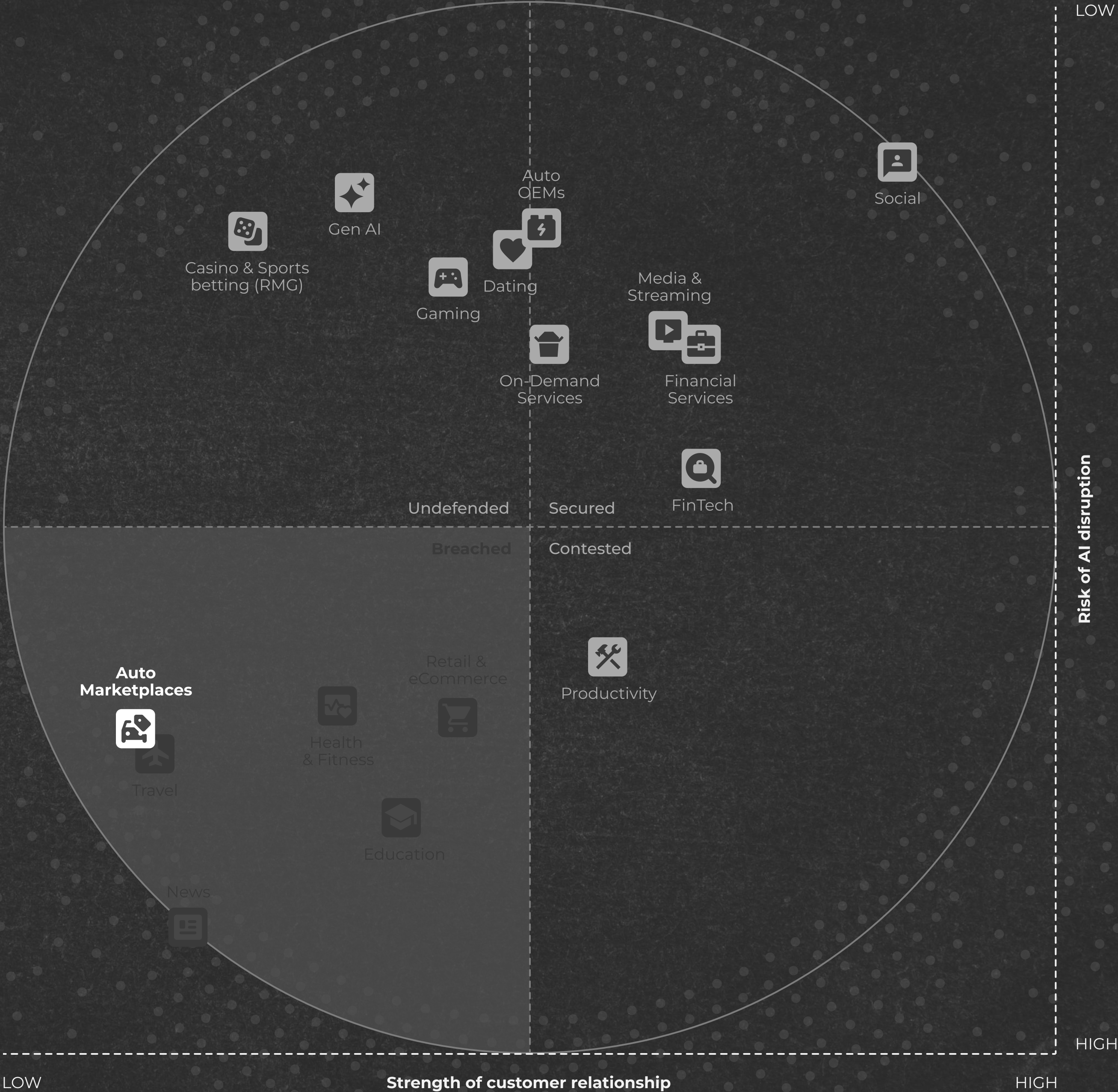
CARVANA · edmunds · CarGurus®

Auto marketplaces face high disruption as AI aggregates listings and connects buyers directly to sellers.

With the lowest relationship strength and heavy web dependence, pure lead-gen models risk disintermediation. Only those with proprietary inventory, dealer integrations, and real-time data feeds maintain defensibility as AI reshapes car shopping from browsing to conversational queries.

> **"Discovery for cars is very visual: Users want to see the listings, apply filters, and compare. AI guidance can help, but it doesn't replace browsing."**
>
> —CMO, Auto Marketplace

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News

HIGH

LOW

Strength of customer relationship

HIGH

News

News faces the highest disruption risk with AI summarizing stories in zero-click answers. Organic traffic has already fallen 26% as AI aggregates and summarizes content (Similarweb 2025).
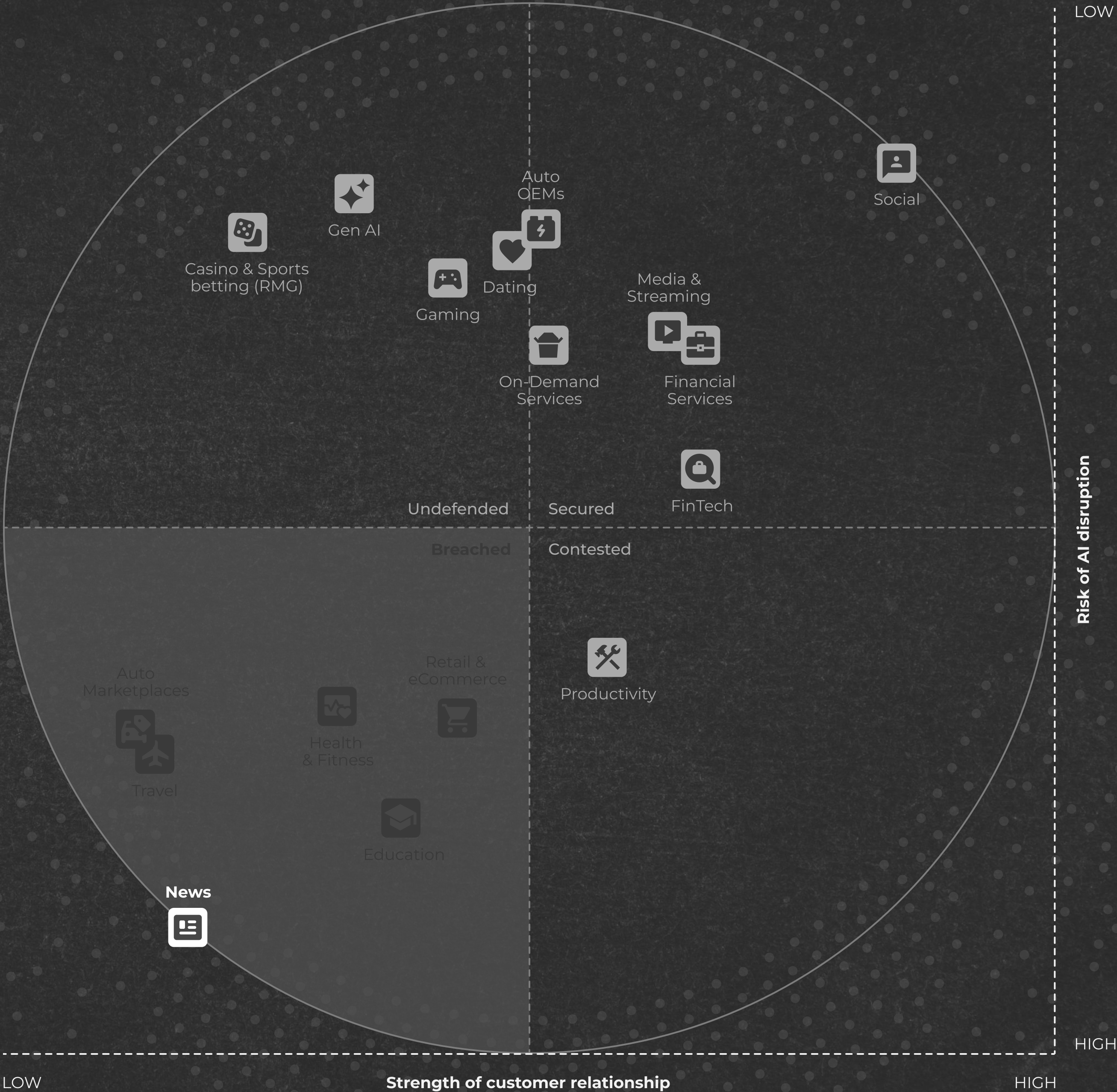
With weak loyalty and overwhelming web dependence, publishers must pivot to investigative depth and direct reader relationships through apps and newsletters or risk becoming invisible content suppliers to AI systems.

> **"When someone clicks from an ad and comes to our site, they're still highly likely to subscribe. But if they've already gotten the content from the LLM, they might not need more—they're less likely to convert."**
>
> —SVP Brand Marketing, Leading News Publisher

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News

Risk of AI disruption

HIGH

LOW

Strength of customer relationship

HIGH

Education

Example companies in category

BRAINLY **duolingo** **Kahoot!** **coursera** **ûdemy**

Education faces the second-highest disruption risk as AI can deliver personalized lessons at near-zero cost.
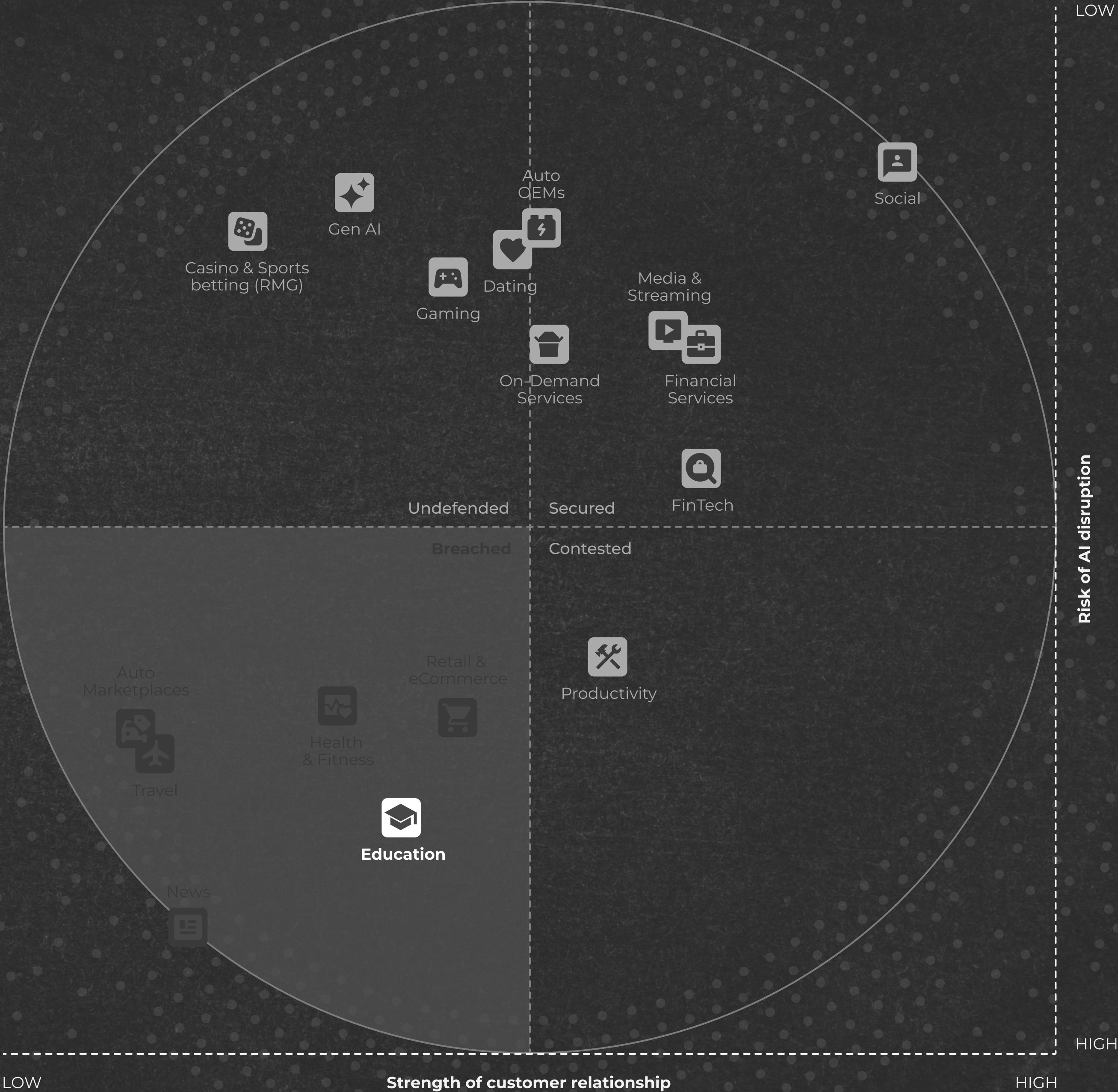
With moderate retention and heavy SEO reliance, pure content platforms are vulnerable while those with certifications maintain some defense. The shift from "searching to learn" to "AI teaches directly" threatens traditional online education models unless platforms emphasize credentials and human validation.

> **"Search has historically been our strongest channel, but we're seeing growing pressure as AI summaries start showing up even above paid results."**
>
> —Global Head of Marketing Strategy, Education App

LOW

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News

Risk of AI disruption

HIGH

LOW   Strength of customer relationship   HIGH

Health & Fitness

Health and Fitness faces high disruption as AI can generate workout plans and wellness advice.
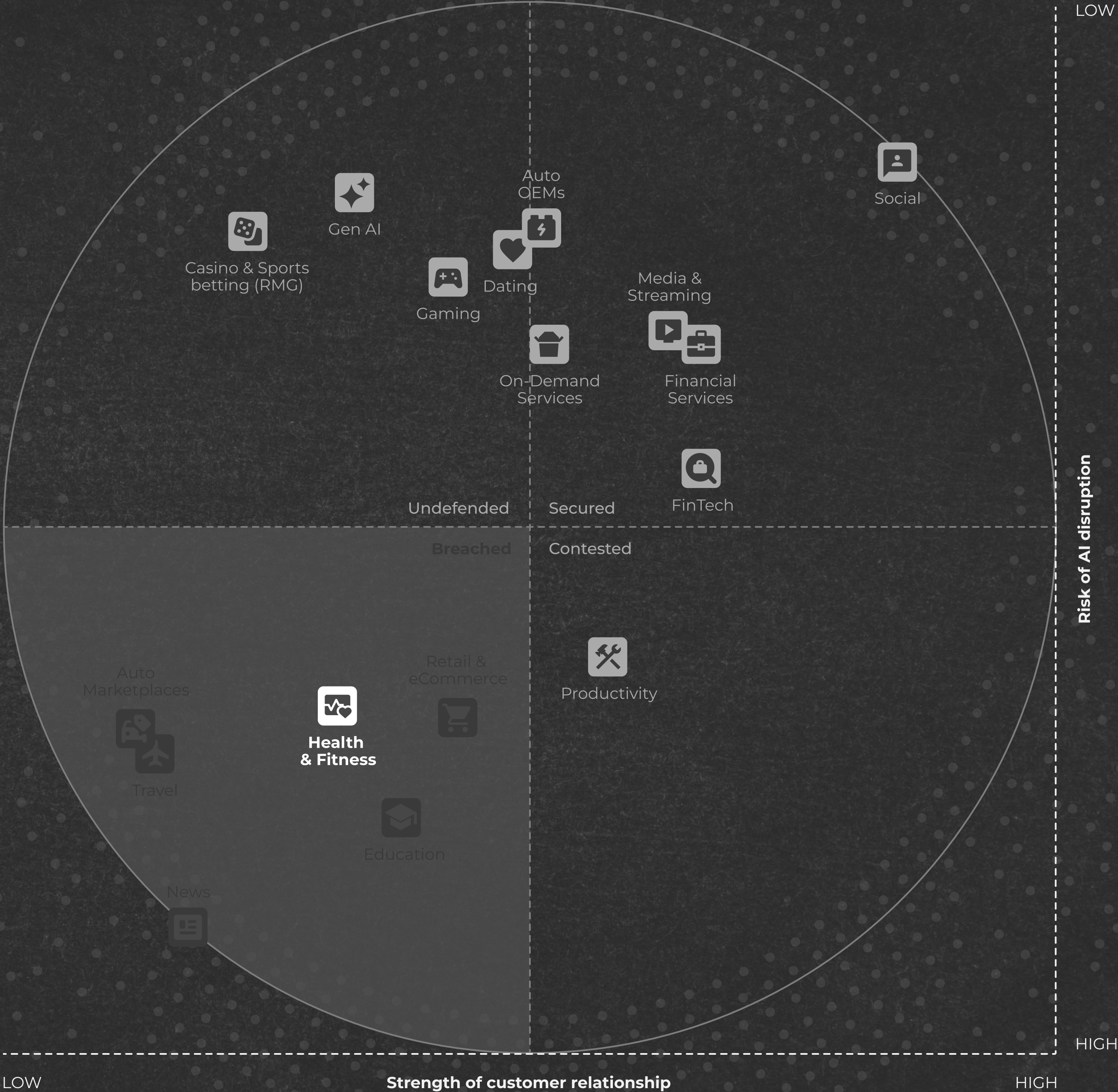
With moderate loyalty and a good amount of traffic from disrupted channels, brands must differentiate through customization, validation, and by leveraging proprietary data. Those emphasizing human expertise, device integration, AI integrations, and clinical accuracy can defend against more generic AI content.

> **"App store discoverability is going to be at risk - people may just go straight to ChatGPT and never search the stores."**
>
> —CMO, Health and Fitness

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Health & Fitness

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Education

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Risk of AI disruption

HIGH

LOW   **Strength of customer relationship**   HIGH

Retail & eCommerce

Example companies in category

amazon · 拼多多 TEMU · SHEIN · ebay · Etsy · Walmart

Retail faces high risk of disruption as agentic commerce can enable AI to handle shopping end-to-end.
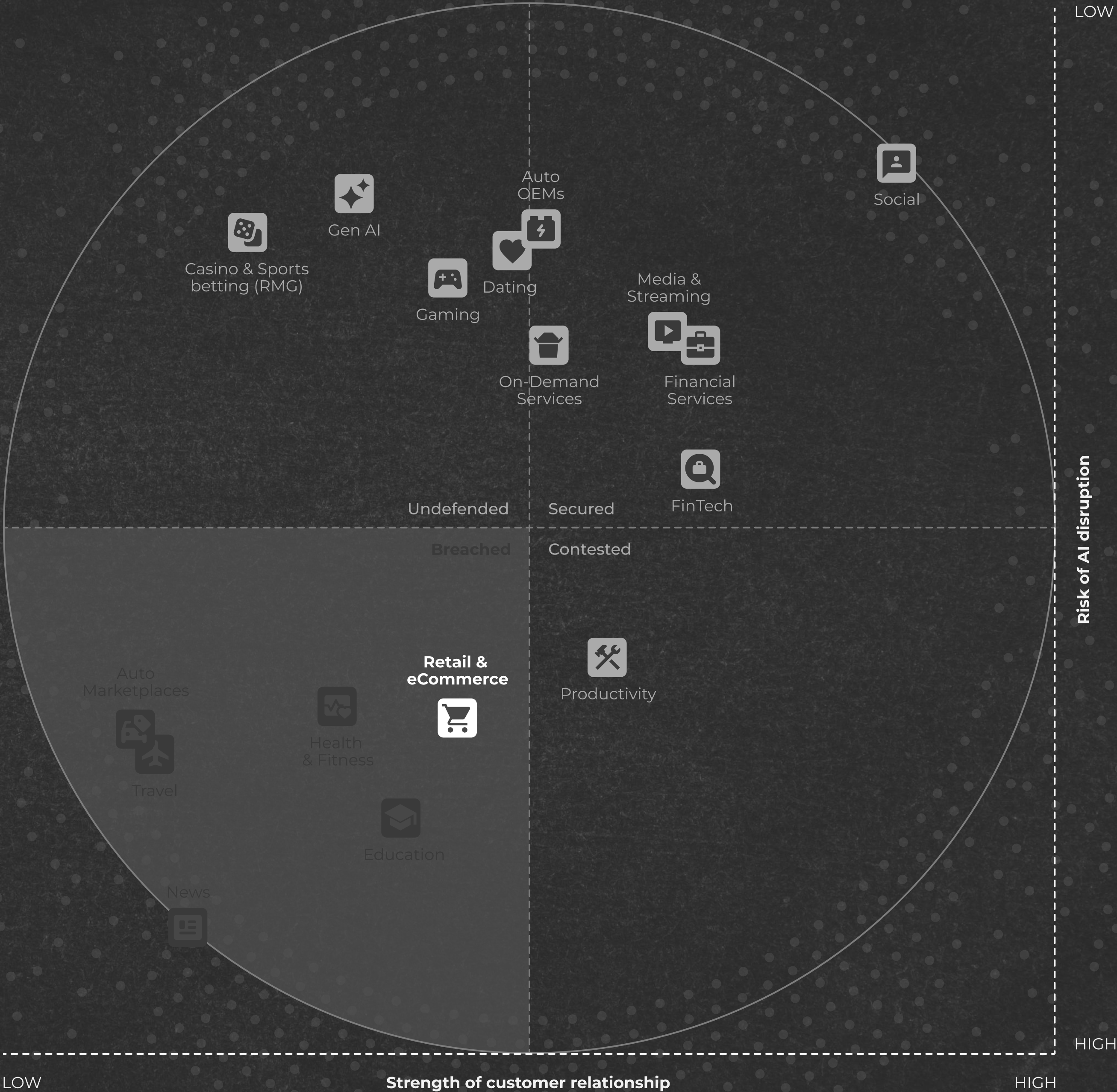
Despite moderate loyalty, heavy exposure to search channels and AI's ability to aggregate product data could threaten direct relationships, signaling a potential future where retailers without unique inventory or fulfillment become commoditized suppliers in an AI-mediated marketplace.

> **"That page is not just for people like you, it is very specifically for you and your household... 100% personalized in almost every case, sooner rather than later."**
>
> —Head of Media, Global eCommerce Brand

LOW

Risk of AI disruption

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News

HIGH

LOW · Strength of customer relationship · HIGH

Productivity

Example companies in category

M Gmail G Suite Office 365 ZOOM

Productivity tools face high disruption pressure as AI agents replicate workflows, but strong loyalty from deep integration buys time.
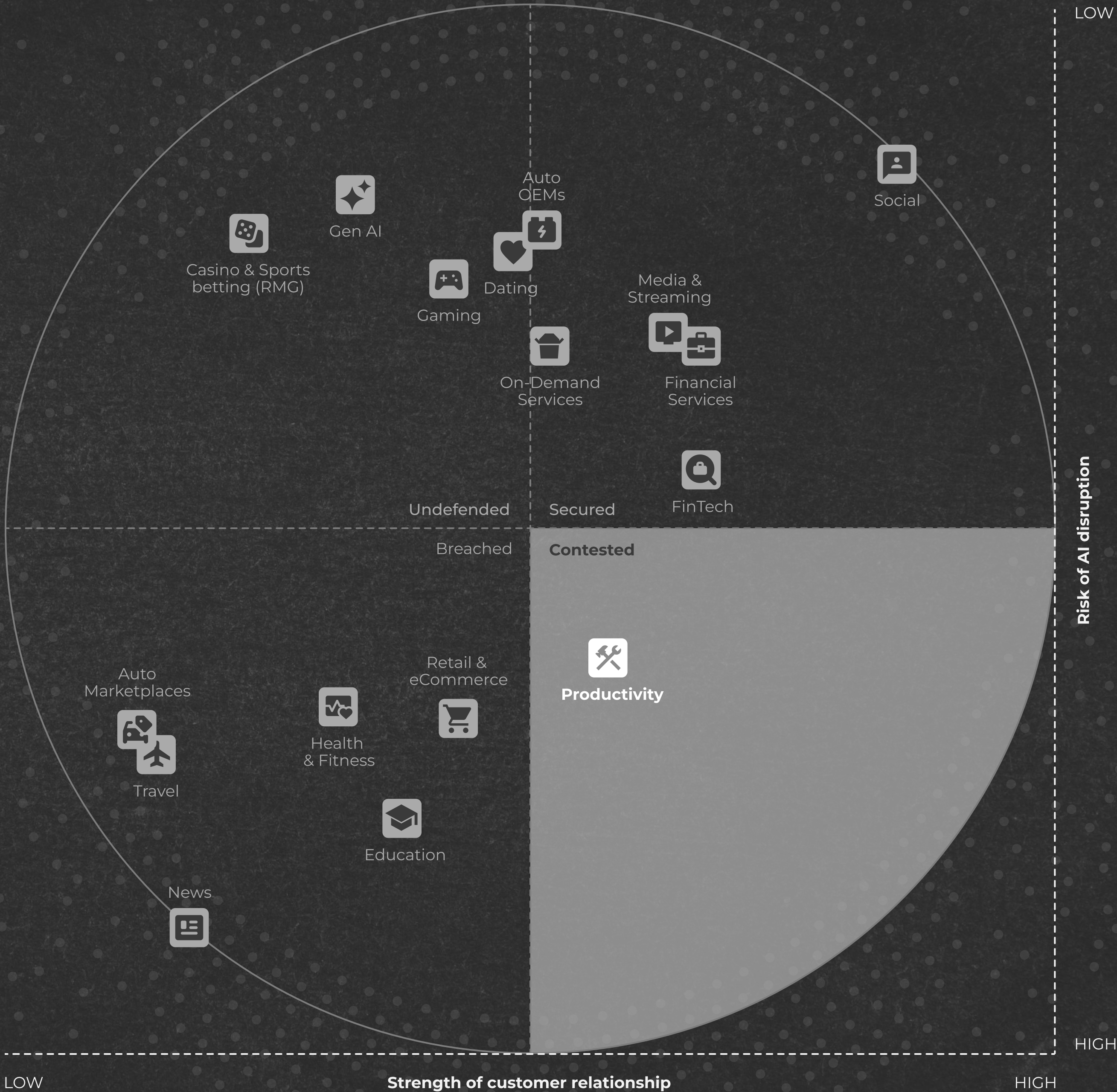
With 40% traffic from vulnerable channels and strong retention scores, platforms must embed AI capabilities directly to maintain relevance as standalone AI threatens to absorb basic productivity functions.

"The goal is to make the experience as sticky as possible so people stay in their accounts and keep engaging."

—Head of Growth Marketing, Global productivity platform

LOW

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LOW   **Strength of customer relationship**   HIGH

HIGH

Auto OEMs

Example companies in category

TESLA   RIVIAN   Polestar   Mercedes-Benz

Auto OEMs maintain strong position through brand equity and dealer networks. With 60% retention and minimal AI disruption risk, luxury brands especially remain resilient.
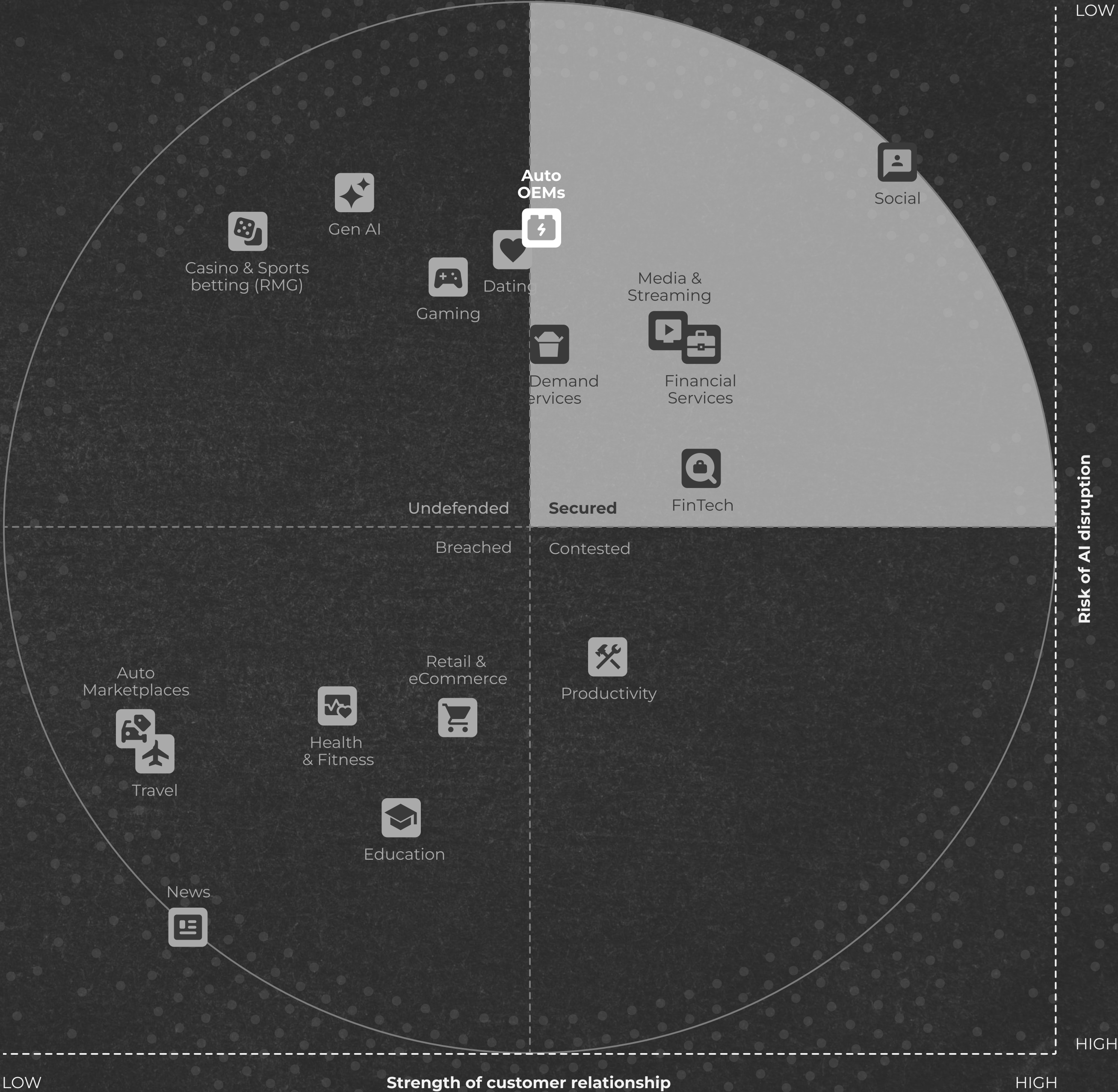
While AI can assist configuration, high-value purchases require in-person validation. The opportunity is enhancing digital tools while preserving the aspirational brand experience that AI can't commoditize.

"AI can replicate things like configurators or trade-in calculators, but those are already digital. The bigger question is whether people will trust it for a $50,000 purchase."

—CMO, Global Automotive Manufacturer

LOW

Gen AI

Auto OEMs

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LOW   **Strength of customer relationship**   HIGH

Risk of AI disruption   HIGH

Social

Example companies in category

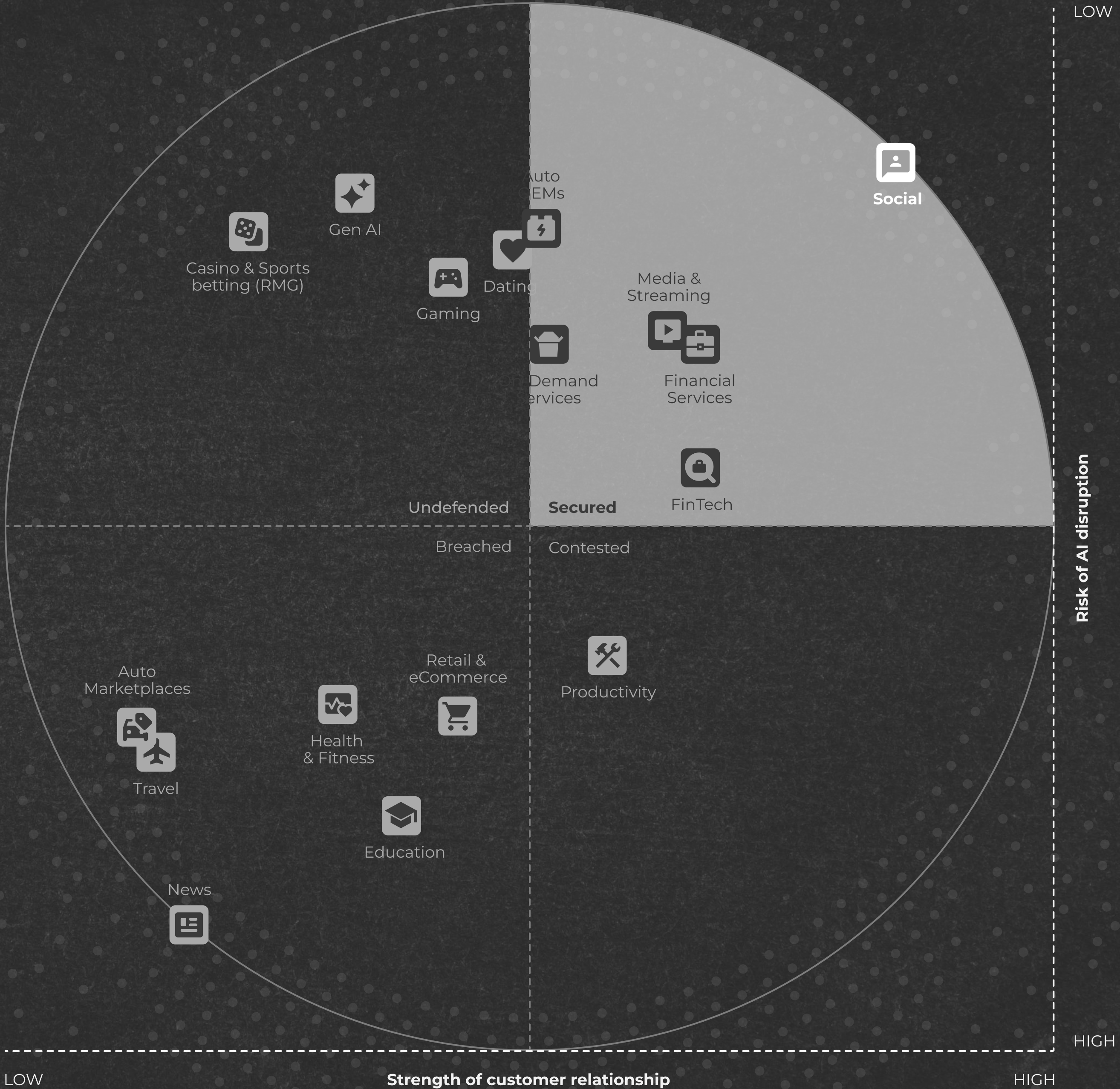Social demonstrates resilience with strong user relationships.

Network effects and real-world relationships create barriers AI can't easily breach. With habitual usage and reliance on mobile apps, social platforms can leverage AI for enhancement.

"Discovery is moving from big platforms to niche communities where CPMs are cheaper and engagement is higher."

—Retention Lead, Global Social Media App

LOW

Social

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HIGH

LOW   **Strength of customer relationship**   HIGH

Casino & Sports betting (RMG)

Media & Streaming

Example companies in category

YouTube Spotify NETFLIX prime Disney+

Media and Streaming platforms benefit from content rights and licensing barriers AI can't breach. With strong retention and subscription models, they face limited disruption.
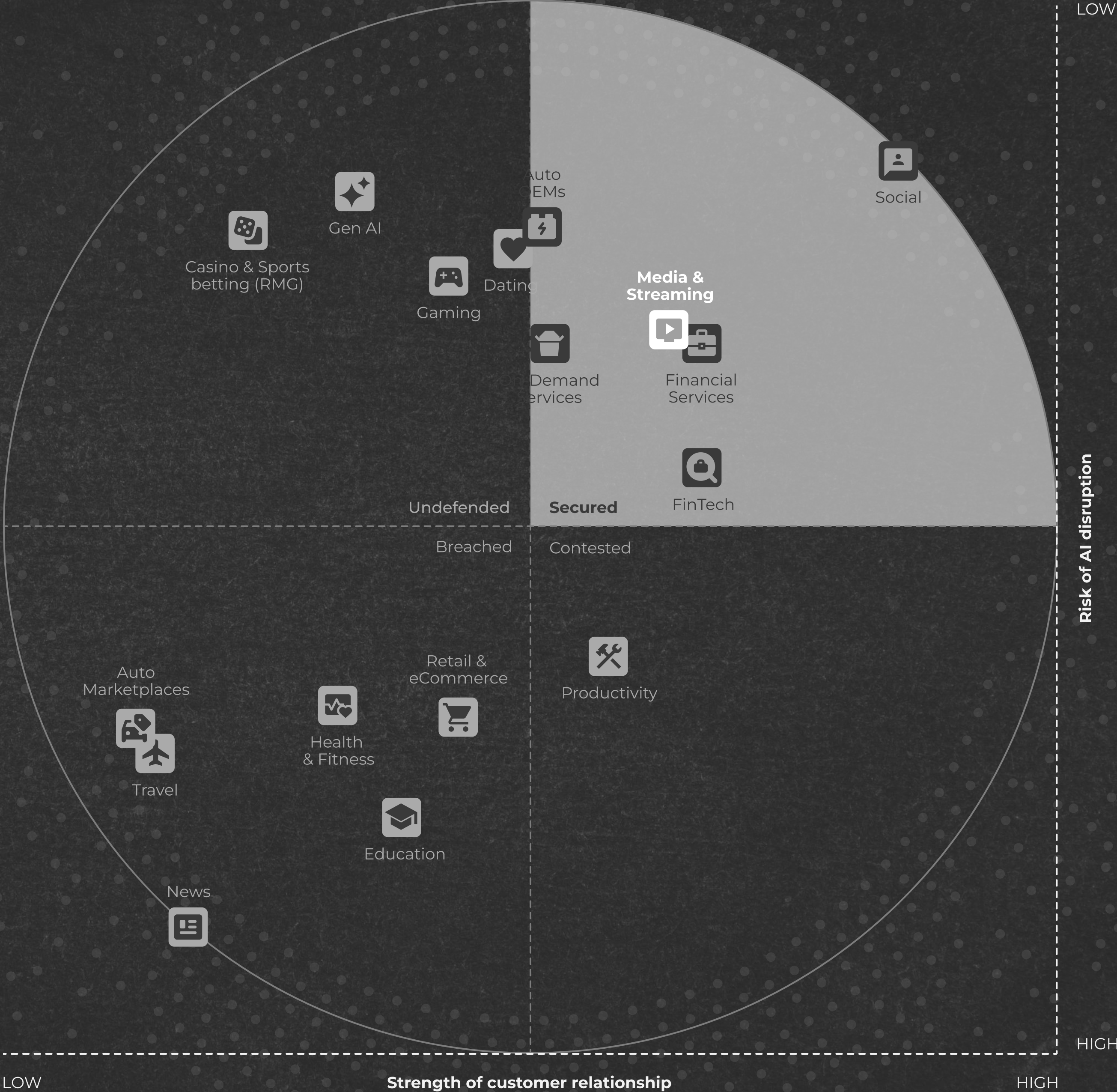
While AI can recommend content, it can't access proprietary content libraries. The opportunity is using AI to enhance personalization and discovery while maintaining exclusive content as the ultimate moat.

> "The traditional entry points of SEO and app stores are exposed - AI can sit on top and redirect that traffic."
>
> —Head of Marketing, Global Streaming App

LOW

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Risk of AI disruption

HIGH

LOW   Strength of customer relationship   HIGH

Financial Services

Example companies in category
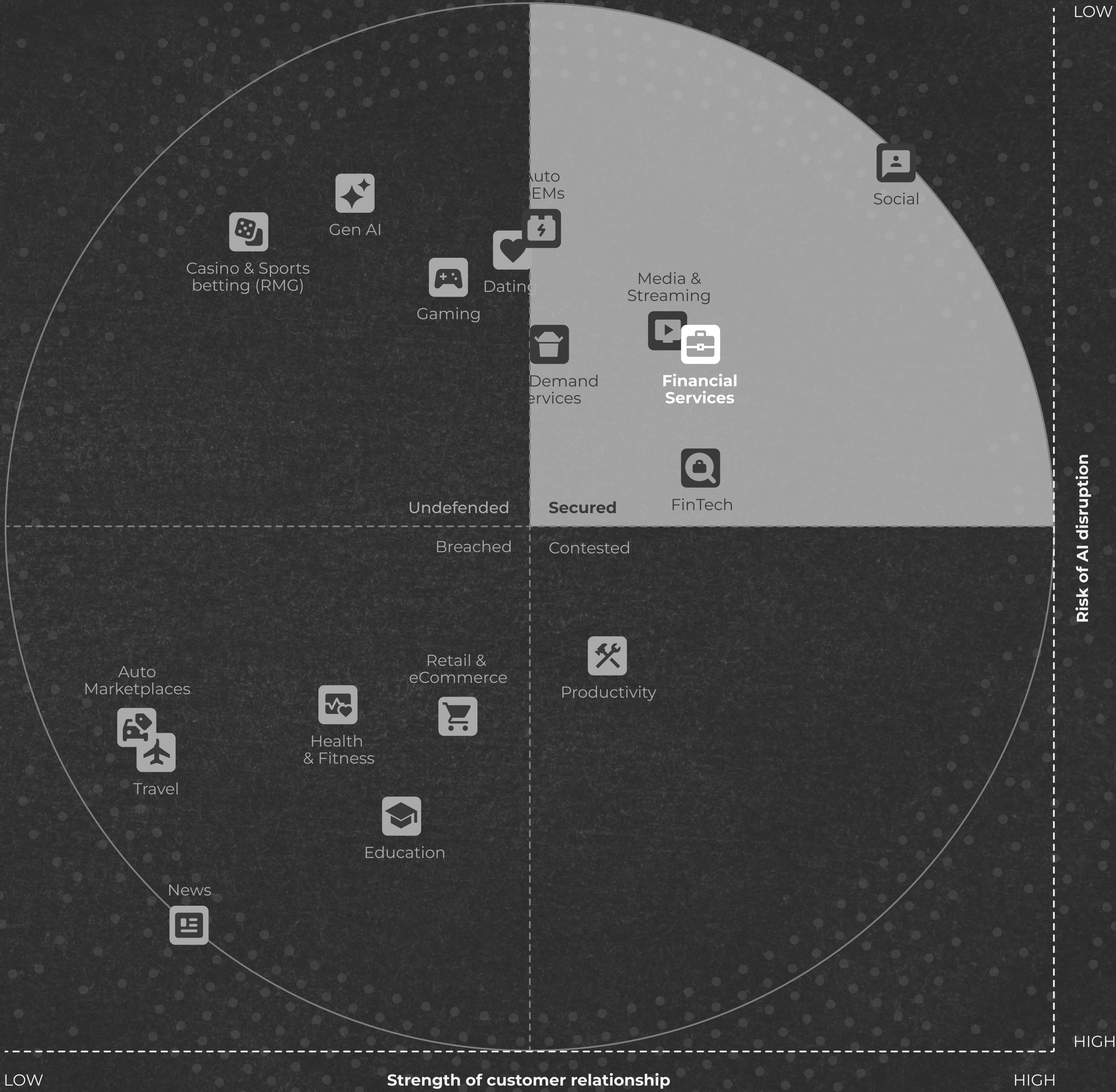
CHASE ○ WELLS FARGO citi ◆ HSBC BBVA

Financial services enjoy maximum protection through regulatory moats and switching costs. With less than a third of discovery traffic vulnerable and strong retention, traditional banks face minimal AI threat.

Core workflows require licenses and compliance AI cannot replicate. The opportunity lies in using AI to enhance personalization while maintaining trust and regulatory advantages that new entrants cannot match.

> **"Financial services will be behind other industries in agentic commerce - people still need to read terms, review details, and apply manually."**
>
> —Head of Digital Marketing Platforms, Leading Bank

LOW

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Risk of AI disruption

LOW — Strength of customer relationship — HIGH

HIGH

FinTech

Example companies in category

PayPal **Revolut** **Cash App** **venmo**

FinTech maintains a strong defensive position with proprietary data moats and regulatory shields.
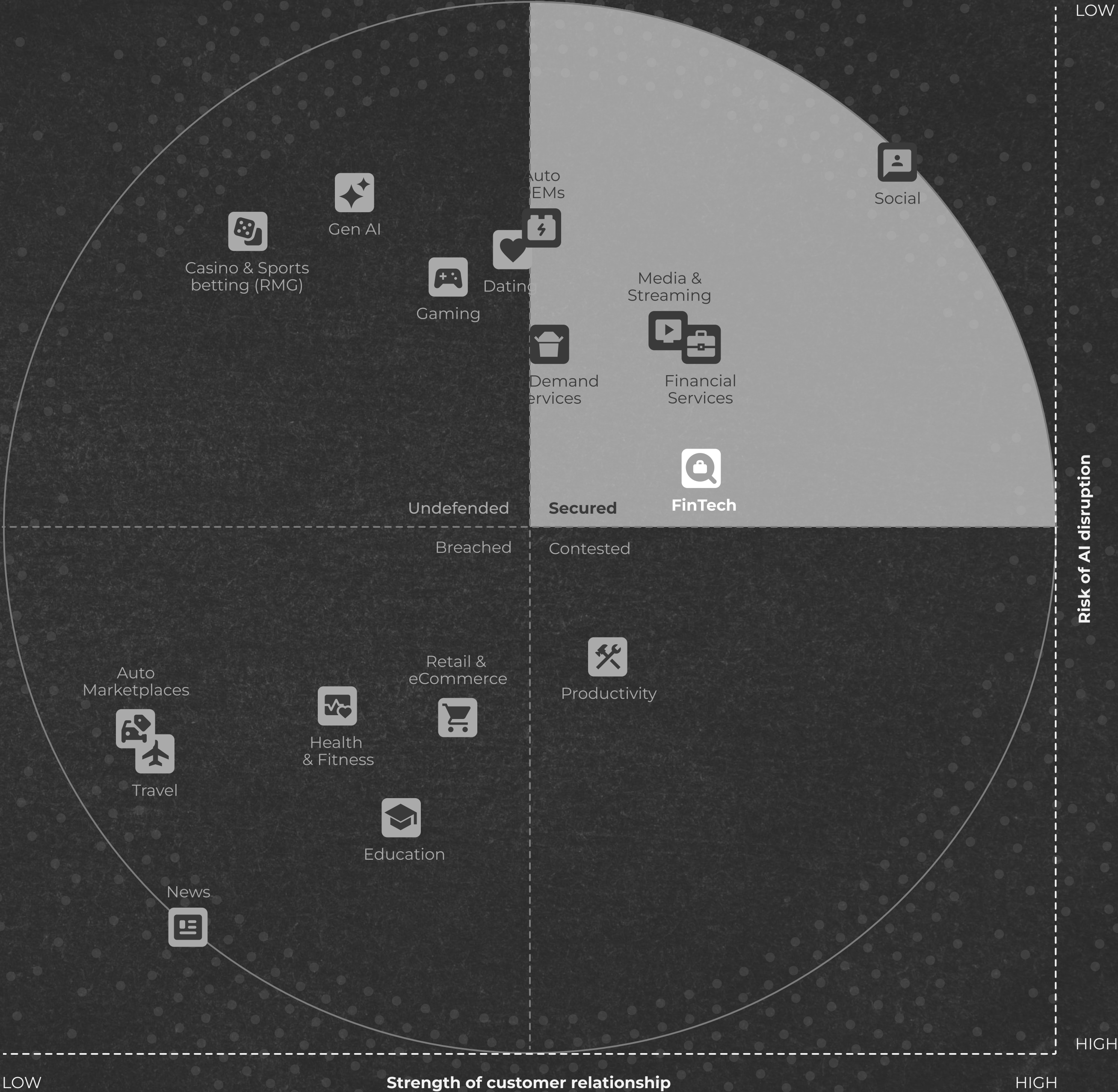
While AI can educate and compare, it cannot access bureau data or approve loans. With 71% retention and 81% app engagement, platforms can leverage unique data while selectively partnering with AI ecosystems to maintain visibility without losing control.

> **"AI isn't sending you ten options anymore. It's sending you one - and we need to be that one"**
>
> —Director of Growth Market, Financial Services Comparison Platform

LOW

Social

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Risk of AI disruption

HIGH

LOW   **Strength of customer relationship**   HIGH

On-Demand Services

Example companies in category

Uber DOORDASH lyft RESY

On-demand services remain protected by real-world logistics AI cannot replicate. Relatively strong retention and proprietary merchant/courier networks means platforms face limited disruption.
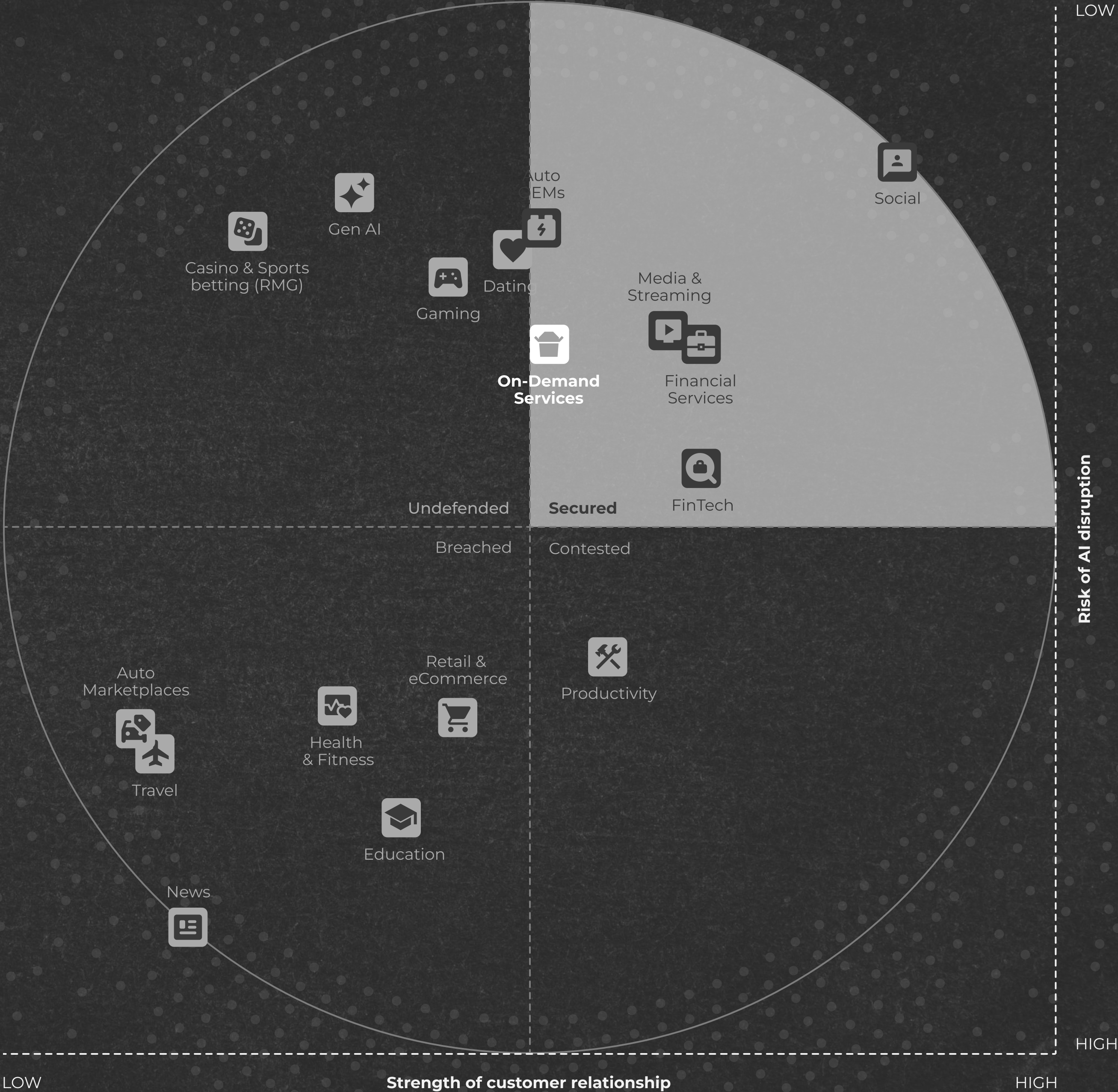
While AI may handle ordering, fulfillment requires physical infrastructure. The opportunity is preparing for agentic reorders while strengthening in-app discovery and cross-category expansion.

> "Most of conversion today comes from promotions, but you can't offer a promo inside an LLM answer. Over time, conversion will depend more on brand trust, and eventually agentic commerce will take hold."
>
> —Head of Marketing Strategy, Global Food Delivery App

LOW

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LOW   Strength of customer relationship   HIGH

Gaming

Example apps in category

ROBLOX   Candy Crush   MONOPOLY GO!   Pokémon GO   ROYAL MATCH!

Mobile companies enjoys some protection from service disruption but relatively weak loyalty creates some vulnerability from discovery disruption.
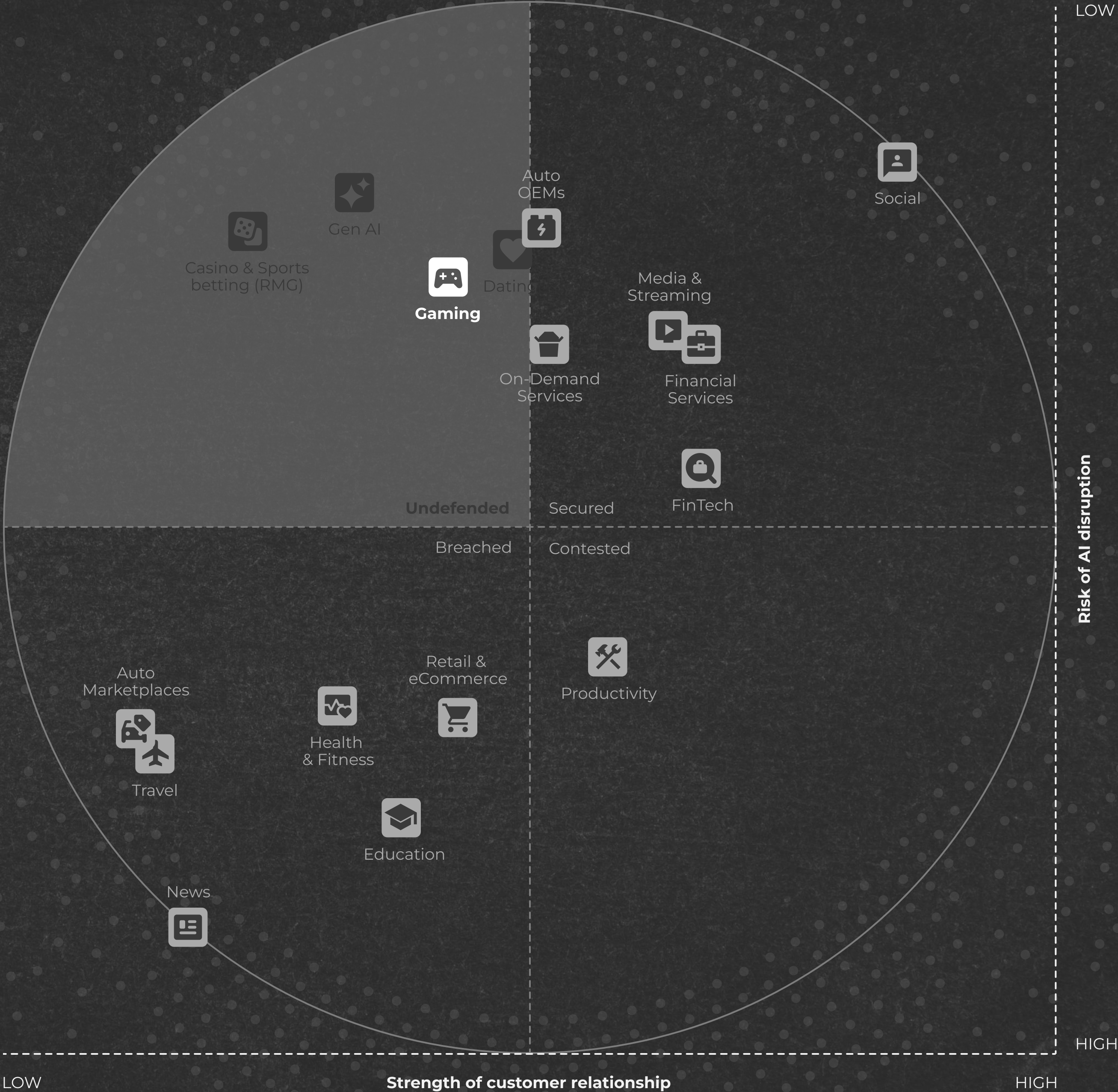
While AI cannot replicate gameplay or live operations, moderate retention and paid-heavy acquisition leave gaming exposed as discovery channels shift. App-native engagement provides defense, but without stronger retention mechanics, user acquisition costs may climb.

> **"AI is great for speeding up creative iterations, but it doesn't replace the actual game or the player experience —those come from years of development, IP, and live-ops."**
>
> —Product Marketing Director, Leading Gaming Publisher

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Risk of AI disruption

HIGH

LOW   **Strength of customer relationship**   HIGH

GenAI

Example companies in category

ChatGPT   **character.ai**   ✳Claude   Gemini

Gen AI platforms face unique positioning: They are the disruptors but face intense competition.

With 40% traffic from vulnerable channels and episodic usage patterns, platforms must build stickiness through distribution partnerships and specialized use cases. Success depends on becoming indispensable infrastructure rather than novelty tools.

> "Most of our growth is still organic... people see an answer link or a shared thread and try it themselves."
>
> —Head of Partnerships, LLM

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LOW   **Strength of customer relationship**   HIGH

Casino & Sports betting (RMG)

Example companies in category

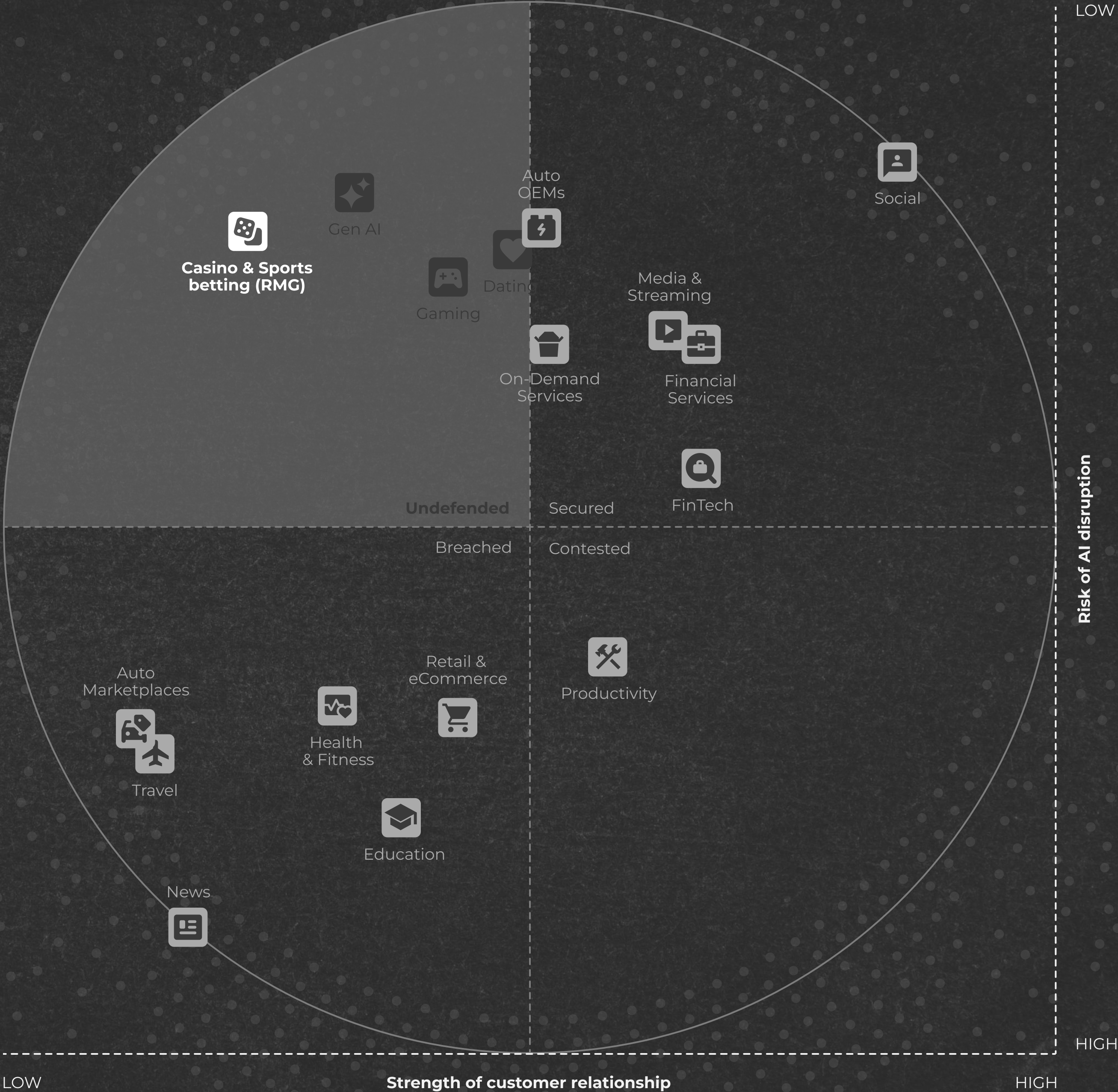**FANDUEL** DRAFT KINGS **betfair** BET**MGM**

RMG remains insulated by regulatory barriers and real-time odds that AI cannot replicate. However, weak loyalty from promo-chasing creates vulnerability.

With 35% traffic from disrupted channels and moderate retention, platforms must strengthen relationships through personalization and VIP programs before discovery channels shift further.

> "It's an app business... almost all of [our customers] are going to be organic on any given day just based on the purchase frequency of the category... for us, brand trust is the number one factor."
>
> —EVP Marketing, Sports betting brand

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Retail & eCommerce

Productivity

Health & Fitness

Travel

Education

News

Risk of AI disruption

HIGH

LOW   **Strength of customer relationship**   HIGH

Dating

Example companies in category

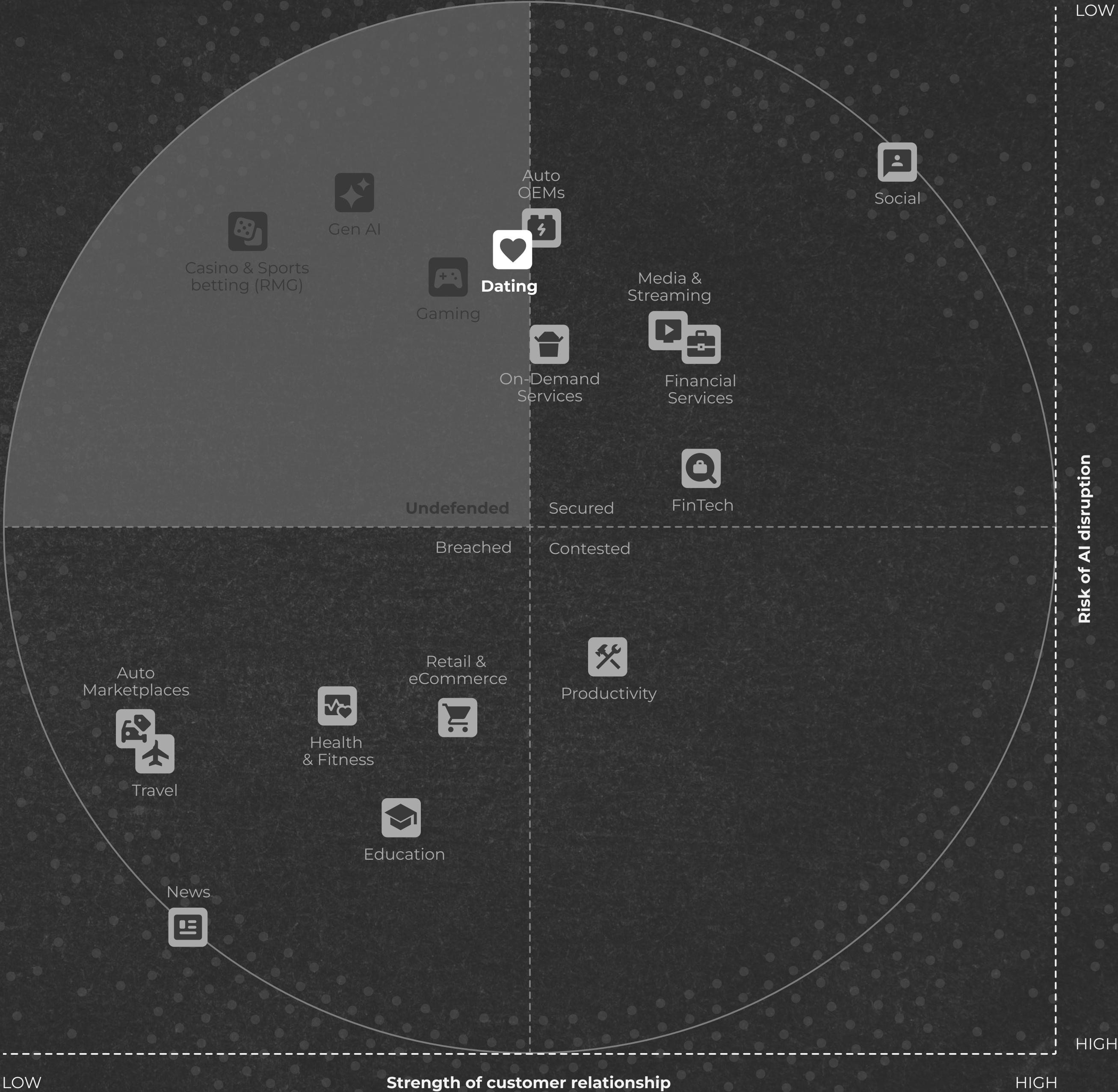🔥 tinder   ⬡ bumble   Hinge   😈 Grindr

Dating remains protected by its core function of creating real-world relationships. However, moderate loyalty and episodic usage create vulnerability.

With moderate traffic from disrupted channels and users increasingly asking AI for relationship advice, platforms must may look to strengthen retention through community features and adjacent networks (i.e., BFF, professional) before AI reshapes discovery.

> **"People still rely on word-of-mouth and friends, but Gen Z is already starting to ask ChatGPT for relationship advice - and that share will only grow."**
>
> —Director, Product Marketing, Global Dating App

LOW

Social

Auto OEMs

Gen AI

Dating

Media & Streaming

Casino & Sports betting (RMG)

Gaming

On-Demand Services

Financial Services

Undefined

Secured

FinTech

Breached

Contested

Auto Marketplaces

Retail & eCommerce

Productivity

Health & Fitness

Travel

Education

News

HIGH

Risk of AI disruption

LOW   **Strength of customer relationship**   HIGH

While journeys shift, **relationships endure**

Every vertical and company will face
a unique set of opportunities and challenges,
but there's one strategic principle that's
consistent. Customer relationships are
the durable asset of the AI future.

Here are **three critical strategies** forward-looking CMOs are using to drive connections:

01 Investing in the best digital experience for customers: mobile apps

02 Owning and activating customer signals

03 Rethinking channel mix in the new age of discovery

Here are **three critical strategies** forward-looking CMOs are using to drive connections:

01 Investing in the best digital experience for customers: mobile apps

While everyone fights for visibility in the disrupted world, surfaces where brands own the direct relationship are now a primary competitive advantage. That's why brands are doubling down on creating great experiences on mobile, the stickiest surface for consumers.

Brands can curate and control the end-to-end **mobile app experience**, and make the most of first-party data to offer:
· Personalized content and discovery that learns from user behaviors and preferences
· AI-driven browsing, comparison, and assistance
· Gamified interactions and exclusive access/rewards
· Community ecosystems and interactions that increase loyalty

For marketers, mobile apps are a **critical digital strategy**. Investing in mobile apps means access to actionable first-party data, closed-loop measurement, and most importantly, continually deepening connections with customers. "

02 Owning and activating customer signals

03 Rethinking channel mix in the new age of discovery

Here are **three critical strategies** forward-looking CMOs are using to drive connections:

01 **Investing in the best digital experience for customers: mobile apps**

02 **Owning and activating customer signals**

Customer signals will continue to be a critical differentiator as third-party signals become less reliable. The more brands can understand their customers, the stickier connections and relationships they can build.

Customer expectations are higher than ever, and making the most of the customer signal can be the primary difference-maker in being able to understand and meet those needs.
Key strategies include:
- Embed data capture throughout the customer journey, not just at conversion.
- Build unified profiles that connect web, app, and offline behavior.
- Use AI to activate first-party data for personalization at scale.
- Drive growth by effectively re-engaging lapsed users.

03 **Rethinking channel mix in the new age of discovery**

Here are **three critical strategies** forward-looking CMOs are using to drive connections:

01 **Investing in the best digital experience for customers: mobile apps**

02 **Owning and activating customer signals**

03 **Rethinking channel mix in the new age of discovery**

While everyone fights for visibility, forward-looking brands are building customer relationships on surfaces they own. Investing in a mobile app can mean access to actionable first-party data, closed-loop measurement, and most importantly, deeper connections with customers.

Not every brand needs an app, but for brands who can offer frequent engagement, complex service, or community ecosystems, investing in a mobile app has huge upsides.

Highly disrupted channels include paid and organic search, programmatic display (web), and affiliate channels

More **resilient channels** are ones with direct engagement and access to first-party data, allowing for personalization and closed-looped performance, including:
- In-app marketing channels
- E-commerce and retail media
- Email and CRM

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Methodology

About the Research
This report leverages insights from multiple research methodologies conducted with Boston Consulting Group from June to October 2025.

→

Quantitative Survey
283 marketing leaders (VP/C-level) across 15 verticals and 5 regions, representing companies from $50M to $10B+ in revenue.

Expert Deep Dive Interviews
15 senior executives (VP/C-level) from leading companies across key verticals.

Performance Analysis
App performance data from 3000+ apps with 200B+ downloads, analyzing retention rates, engagement patterns, and acquisition channels (Moloco/Sensor Tower/Semrush).

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