Everything is Fine (?)!

How are experimentation agencies growing in 2026 and beyond. Includes pricing strategy and AI use data.

by Craig Sullivan



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Why I wrote this

I experiment with LLMs and AI tools every day, and I have been using them with experimentation teams since 2022. I co-wrote the *AI Playbook* on how to *think critically* when using AI for experimentation. It has been downloaded over 3,000 times and more than 2,000 people have been through my workshops. Johann van Tonder and I also built the Hypothesis Helper, Checker and Kit v4, which experimenters around the world use daily.

I did not use AI to write this report. I used it to find the flaws in my analysis and to probe my assumptions, which is a job it is actually very good at. You have to do the thinking reps. Please don't outsource your brain.

So what kind of AI person am I? Equal parts sceptic, booster and doomer, because those are answers to three different questions. How the tools are used, where they are flawed, and who controls them are separate things, and they are all important. That makes me a rare animal: a proponent of LLMs who is both sceptical *and* concerned. Just call me an AI realist 🙂

Last year's research predicted that AI would change the field, and it certainly delivered. Most of our predictions came true, so this year I wanted to separate the BS from reality around AI. If it *was* having a transformational impact, then data and research would tell me more.

What we did find is that everyone adopted it, a small number turned it into an efficiency advantage, and some found it made things worse. The answer is not simple, but it is interesting, and it's why I keep researching this area. A playbook for teams that want the higher-value gains is next, because it's not about AI. It's about *people*. When you speed up the idea-to-test cycle, the outer human loop becomes more important, not less.

Convert and Speero made this research possible, and they have only ever offered help and support, to improve the output quality. Neither asked to influence the methodology, the questions or the findings. That freedom to explore what's going on is the strength of this work.

For the last three years I've been helping teams improve the quality and impact of experimentation: organisational audits, coaching, mentoring and fixing outcomes at programme level. And the AI part? I can show you the thinking that gets you onto the higher productivity plane. If you want better outcomes, get in touch: sullivac@gmail.com

About convert®

For 17 years, Convert (Experiences) has been the preferred experimentation platform of rebels.

The optimizers, the growth experts, the marketing teams that questioned why apps came with exorbitant price tags, a heaping side of bureaucracy, and nasty billing surprises.

Those same builders and rebels are deep in AI right now, and the basics are a solved problem, so both the work and the tools must contend with a much higher bar. Our platform is evolving with them, into a growth and experimentation suite that takes teams from scattershot bets to compounding gains. We are wiring AI in the right places - admin, operations, careful automations to ensure both efficiency and control over data privacy & launch decisions.

This report is a labor of love for our kind of folks working in agencies. It's something we did in 2025, and will continue to do every year til we have an extensive body of agency growth research that's in-sync with changing markets.

Agencies lead the charge of innovation. Yet, they often neglect their own growth processes. Drawn from 55 agencies, this is the growth template you can refer to knowing the recommendations come from carefully collected data and expert-vetted insights, explicitly structured to answer agency-side questions you don't find ready answers to elsewhere.

About speero by CXL

Speero builds, runs and scales growth experimentation programs for product and marketing teams. The work spans user research, data and engineering, A/B testing, and the operating system that holds all of it together. Most clients come to us with a testing program that already exists and isn't paying for itself yet.

The frame we use is Experimentation-Led Growth: experimentation isn't a service you buy, it's how a company decides things. What we build toward now is GXOS, our Growth Experimentation Operating System. It's AI-native, and it spans experimentation, research and data rather than testing alone. Think of it as a harness a company owns and runs: strategy and problem framing, research systems, data quality, velocity, governance, and a memory of what's already been learned so that context isn't lost.

This report describes clients pulling testing in-house. We'd rather help that happen than defend against it, and GXOS is what we hand over when we do. A large share of our work is enablement: auditing and benchmarking a program against the market, embedding with client teams, wiring testing tools into CRMs and warehouses so the numbers can be trusted, and leaving behind a system the company runs itself to decide faster and learn faster.

On AI, we agree with where Craig lands. The floor has risen for everyone. Our effort has gone into the operational end, building agents and tooling into GXOS and into how the work gets delivered, not bolted on beside it. The point isn't speed for its own sake. It's buying back the hours and spending them on the part clients are really paying for, which is judgment about what to test, what a result means, and what to do next.

Speero is a team of around 40, working with brands like ADP, Typeform, AG1, ClickUp, Mews, Mongodb and many others. We also run the Circus conference series on experimentation and AI. If any of the above is useful to you, come find us.

Table of contents

Executive summary 6

Agency Information 8

What changed since last year? 9

AI is everywhere – and that's the problem 11

The Held Paradox 18

Confident - but the real worry is demand 27

What the smart agencies are doing 31

Methodology 39

Get connected 40

SECTION 1

Executive summary

When we started our research into the ecosystem last year, three things were very clear from the outset: huge changes were afoot in the market, clients were evolving considerably and execution work was already being commoditized. Hovering over all of this, like a giant mothership over the cityscape, was the existential threat of AI. This is a recap of what we found:

- **Clients were maturing and bringing work in-house.** They were building their own programs, hiring specialists, demanding business value (ROI) and velocity over test counts, with decision-making shifting to product teams and more senior leadership. The signal was clear: clients wanted agencies to *elevate their capability*, not just run execution.
- **Execution was being commoditized, and the economics were tightening.** Macroeconomic pressure and a crowded, global market were squeezing budgets and nudging clients from retainers toward flexible, project-based work (we were wrong about this). Core test execution, once a differentiator, was becoming table stakes, eroding the pricing power of agencies that sold it.
- **AI was already changing the work, but mostly at the edges.** Three-quarters of agencies (76%) called AI a key part of their workflow, using it to speed research, build and analysis, but largely ad hoc, with very few rewiring workflows or running agents. We predicted it would accelerate commoditization and split the field into AI-augmented agencies and those left behind.
- **The throughline: experimentation was shifting from craft to infrastructure.** The bar was rising and value was migrating upstream, so the agencies positioned to thrive were those embedding deeply, enabling client capability, and turning experimentation from a service into a growth function.

This year, the focus shifts to AI changes and drivers, demand and pricing pressures, commoditization, and the pathways agencies are betting on for future growth.

Quite a lot of our 2025 predictions have **come true**; we were on the right track for most of it, and the research was solid. We were wrong about AI changing pricing and agencies moving to more flexible work (nope, still retainers mainly).

Building on that foundation, the 2026 edition digs deeper to find out what's really going on. And it's not just ***our*** research showing these events unfold. A 2026 Foxwell / Motion study surfaced many of the same trends and issues.

What we found in 2026

1. **Everyone uses AI.** Every respondent uses it, typically for 8 of 16 experimentation tasks. Only 9% have embedded it deeply enough in delivery to gain an edge. Breadth is now the baseline. The difference comes from operationalizing it.
2. **Agencies hold two opposing views at once.** 63% say AI is commoditizing what they sell. 81% say they have a human advantage AI can't replicate. Half the sample (50%) agree with both statements. These are the same firms, accepting the erosion of execution work while betting on the part AI can't touch. We call this the held paradox.
3. **Clients are asking for more, at the same fee.** 57% say clients now expect faster delivery or more output for the same price. Only a third report clients expecting lower prices. 81% of agencies raised or held rates over the year and 15% cut them.
4. **AI intensity does not buy pricing power.** We tested five measures of AI intensity (task breadth, tool count, agents in delivery, cycle-time gains, centrality to workflow) against price changes. None of them tracked price. If anything, the heaviest AI users had slightly lower prices, though the effect is weak and not significant.
5. **Prices rose because agencies repositioned.** Of the 25 agencies that raised prices, 72% cite moving to higher-value work as the driver. Changing service mix (36%), rising delivery costs (32%), demand pressure and new services (28% each) come next. Pricing power follows positioning and client mix. Delivery economics barely register.
6. **Agencies are confident in themselves and worried about demand.** 83% expect to stay relevant and 85% see new services driving growth. Confidence drops when the questions turn to the market. Only 52% would be OK if their top three clients cut spend. The top risks are pipeline (39%) and retention (30%). When asked what would make the biggest difference to growth, the most common answer (40%) is the same thing: winning and keeping clients.
7. **Work is moving in-house and getting more technical.** Between the 2025 and 2026 snapshots, clients bringing testing in-house rose from 62% to 69% and server-side testing nearly doubled, from 18% to 35%. The 2025 stories of experimentation shifting to product teams and clients demanding ever-greater ROI and velocity both came in softer this year.
8. **Test output scales with headcount.** Test volume tracks team size, the strongest relationship in the whole study. No measure of AI use moves with it. The gains from AI are real but concentrated in a small number of agencies. We explain what those agencies are doing differently.

SECTION 2

Agency Information

Who we heard from

Profile of respondents.

Agency type



Tenure



Test velocity



Experimentation team size



Source: Agency & Consultancy Research 2026.

Our research this year was primarily built on a survey of a range of agency types and sizes, but also drawn from conversations with agency founders and leaders. We are building on this research further to find out where the sweet spot is for efficiency or quality gains for experimentation with AI toolkits.

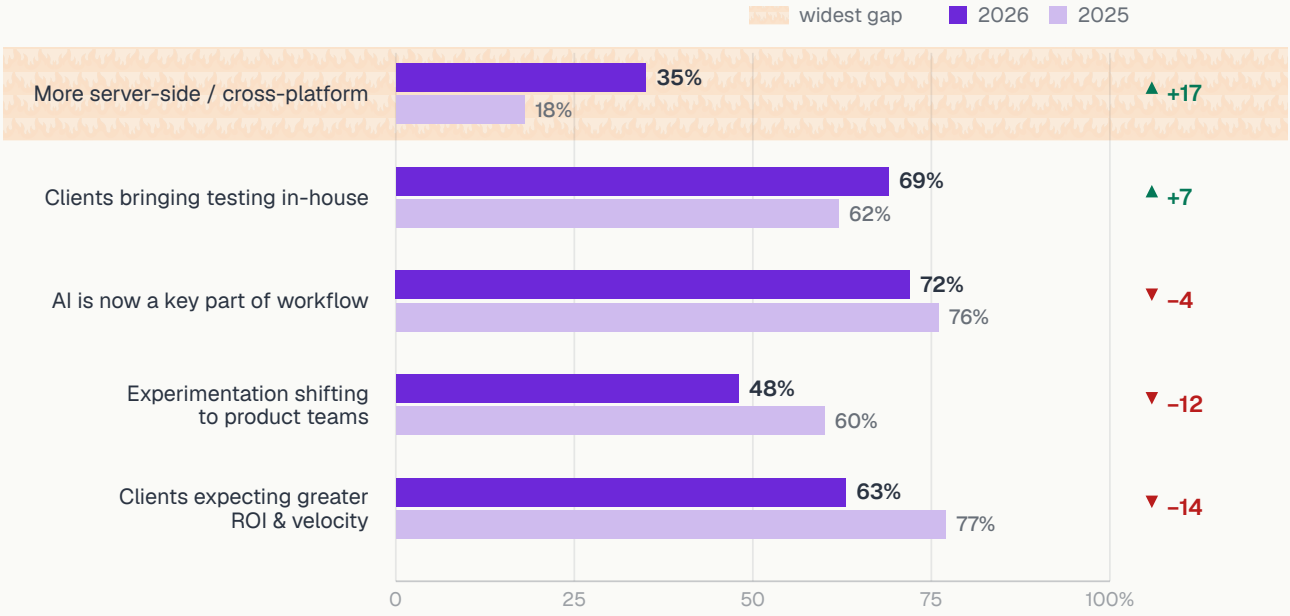
SECTION 3

What changed since last year?

Five questions appear in both the 2025 and 2026 surveys, which invites a comparison – with one caveat up front: these are two different snapshots, different samples.

What shifted between two snapshots: 2025 vs 2026

Net agree (Agree + Strongly agree). Directional contrast between two surveys – different samples & instruments. Not a trend line.



▲ = percentage-point gap. No significance testing.
Source: Agency & Consultancy Research 2026 vs Agency & Vendor Experimentation Ecosystem 2025.

The widest gap of all is on server-side and cross-platform testing, with clients bringing work in-house increasing over last year. The framings that carried the 2025 story, experimentation shifting to product teams, and clients demanding ever-greater ROI and velocity – both read slightly softer this time, while AI's place in the workflow is high in both years. None of it is a trend, but the two snapshots set the scene for this year.

We are seeing more data engineering work, like hooking up testing tools to CRMs, Data Warehouses, etc.



Ben Labay
speero by CXL

A noticeable shift towards in-house capability building rather than full outsource models, with clients wanting consultancy and enablement rather than a managed service.



Jon Crowder
Another Web is Possible

SECTION 4

AI is everywhere – and that's the problem

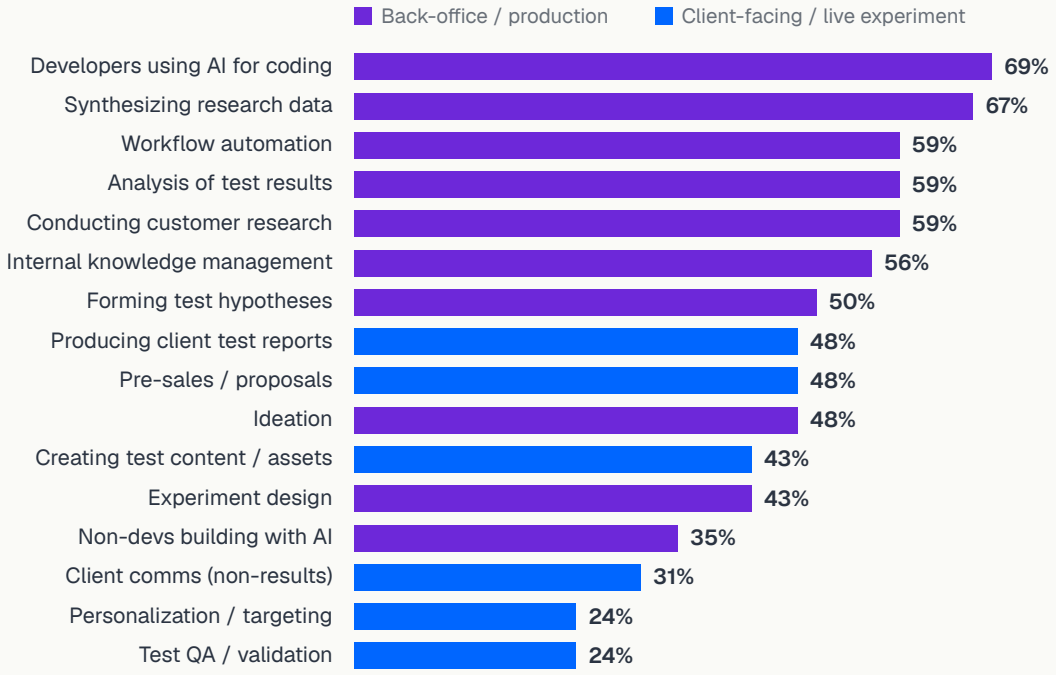
> **No one will shut up about it.**
>
> 
>
> **Craig Sullivan**
> Optimise Or Die

Agencies were clearly apprehensive about AI last year and this remains the case in 2026, although the reasons for this have shifted. Adoption is total now: 100% of agencies are using AI tech and tools in their work.

The average agency uses it for 8 task types across 4 different tools, but that breadth is uneven: over half (52%) use AI across eight or more tasks, while a fifth (20%) still use it narrowly, on three or fewer tasks.

AI runs deep in the back office, thin at the client edge

Share using AI for each task (multi-select). The client-facing tasks (blue) cluster at the bottom.



Source: Agency & Consultancy Research 2026.

You can clearly see that the spread of tasks is deepest where it speeds the agency's own production, shallower where it touches the client or signoff space.

> **All of my clients are using AI in their workflows this year. Last year some were, now everyone. They also ask how I am using AI to speed up CRO work I do for them.**
>
> 
>
> **Gijs Wierda**

Voice of the client: What agencies report changing at clients: The floor rising isn't only an agency story; clients are changing at the same time. AI usage is the dominant thing agencies notice changing in their clients (41%), alongside a maturing appetite for experimentation (35%) and tighter budgets (24%).

> There's a push for more velocity using AI and less resource.



Amrdeep Athwal

Conversions Matter
Let us help you get more

> Less budget for testing, more demand for Insights, more questions on how AI affects services.



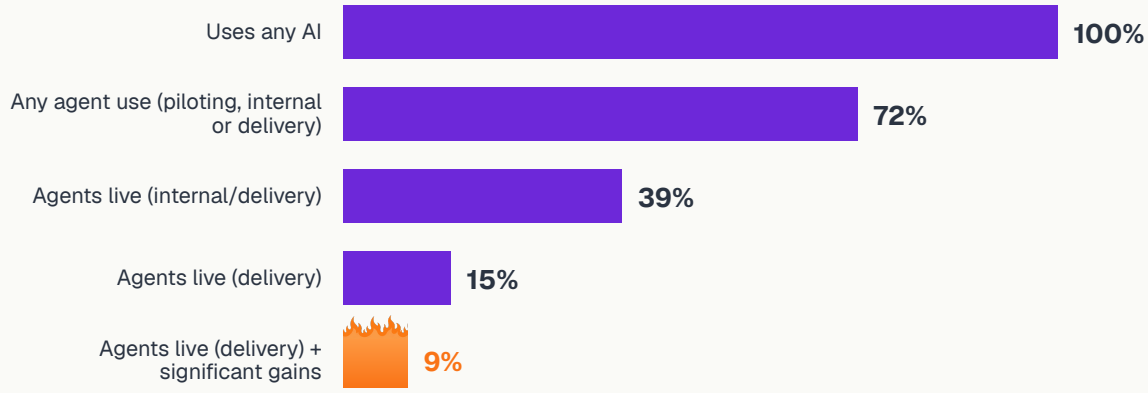
Vassilis Tourtouropoulos

Jellyfish

Despite this broad adoption of AI tech, most agency usage remains ad hoc or as a 'sidecar' to existing processes. Here's how it breaks down:

The AI maturity funnel – adoption to advantage

Everyone has adopted AI; almost no one has turned it into an operational edge.



Source: Agency & Consultancy Research 2026.

Many agencies are still researching, piloting and experimenting using agentic systems and mainly for internal company workflows. Only a small number have agentic tech 'in production' for client-facing work. This specific group shows gains in cycle time that are much higher than average. Whilst 83% of all agencies report ***some*** cycle time reduction from AI, the gains are highest where we see agentic tech being used in client delivery systems.

Most agencies meet the low average of gains in the last year. 65% report slight gains and 17% nothing or unsure. What separates the few with big gains is operationalization, wiring these tools into production workflows rather than considering, researching or piloting.

We use Gemini Pro daily, moving our marketing and product delivery pipeline into agentic systems.



Vassilis Tourtouropoulos
Jellyfish

We have tested 16 AI tools. The design team became up to 50% more efficient... The development team became up to 30% more efficient with A/B testing development.. QA - unfortunately we are yet to find a way to utilise AI to increase QA efficiency. The QA Engineers still have to go through the variations manually across different browsers and devices.

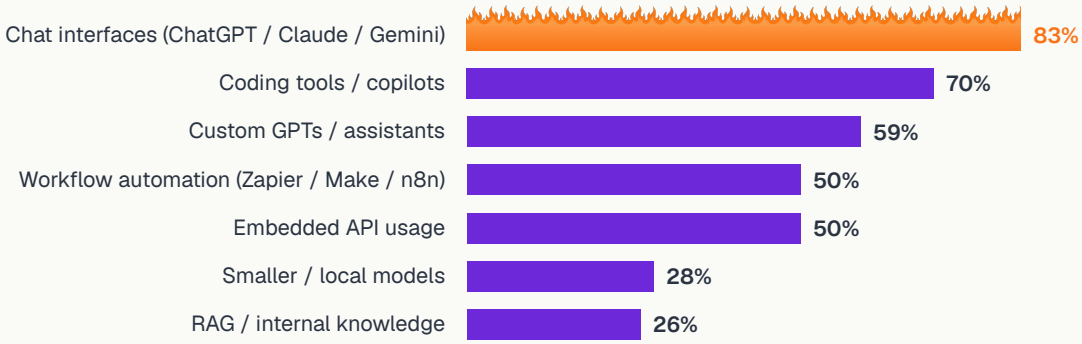


Tasin Reza
ECHOLOGYX

The same divide shows up in the tools themselves.

Everyone is in the chat; few have built underneath it

Tech used in AI workflows



Source: Agency & Consultancy Research 2026.

> **The biggest gain has been through AI-assisted development, both for software and for AB tests.**



Ryan Thomas
koalatative

Most agency ‘workflows’ are using the chat interface of AI tools (83%), and most use coding copilots (70%) - the stuff that’s easy to reach. The tools that mark real operationalization sit lower: API usage, workflow automation at 50%, RAG and internal-knowledge assistants being used by just over a quarter.

Interestingly, smaller models run locally manages 28%, which is a really positive sign to see. Token prices are artificially subsidised with the frontier models many of us use - why use a giant datacentre on the other side of the world, when you can put it next to your current datacentre and own the hardware and data privacy?

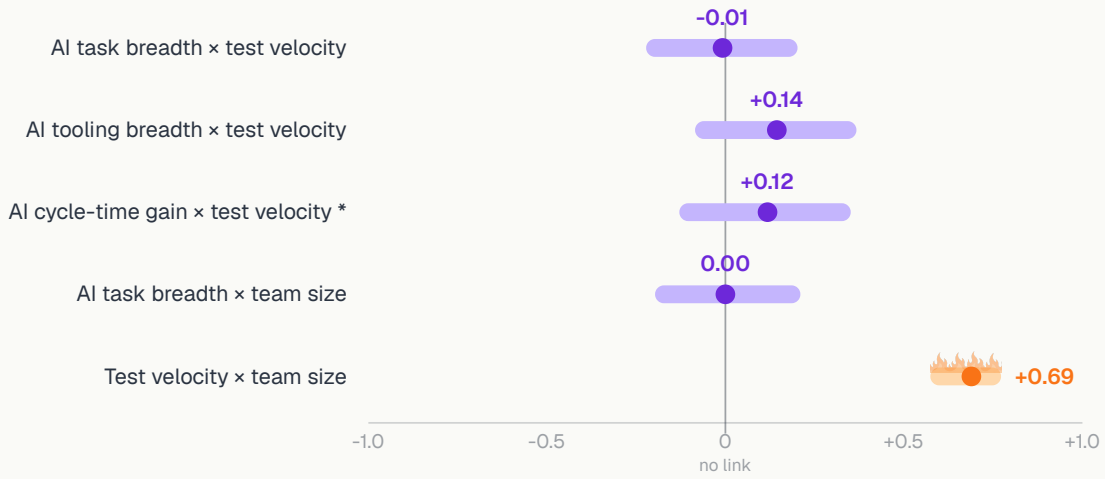
Despite that glimmer of a different future, this graph underlines our analysis, which shows most usage is ad hoc, a sidecar to a current workflow or process.

Here’s another way of looking at the data: the volume of tests an agency runs. That volume goes up with a growth in team size, which is expected behavior.

What about the use of AI? Does that increase volume or velocity?

AI intensity is decoupled from scale

Test throughput tracks team size – but no measure of AI use does.



Kendall τ-b (tie-corrected) · bars = BCa 95% CI
* Cycle-time gain is low-variance (73% gave a "slight" reduction) – least informative row. Spearman concurs throughout.
Source: Agency & Consultancy Research 2026.

So here's the followup question: Does using ***more*** AI tools (or using them for ***more*** tasks) show any pattern?

No, and there isn't anything apart from team size that's driving a higher volume of experiments.

So three lenses and one finding - your AI usage and breadth buys no edge. Cycle time gains are near universal, and test throughput tracks team size, not AI. When everyone has the floor, the floor stops being a selling point and advantage with AI has migrated to *how* you deploy and integrate. And as the next section shows, the use of AI isn't driving price shifts.

AI isn't significantly shifting what we do day to day or how we do it, but we are all leveraging incremental changes.



Garret Cunningham
Columbus

Without a ton of time investment which we don't have as a small team, it's been more time consuming than helpful to break through some of the barriers of generic outputs.



Greg Wendel
DRUMLINEDIGITAL

We've seen clients buy into more advanced tooling just because they think it will give / advance their AI capabilities - expensive licenses when they don't actually need it.



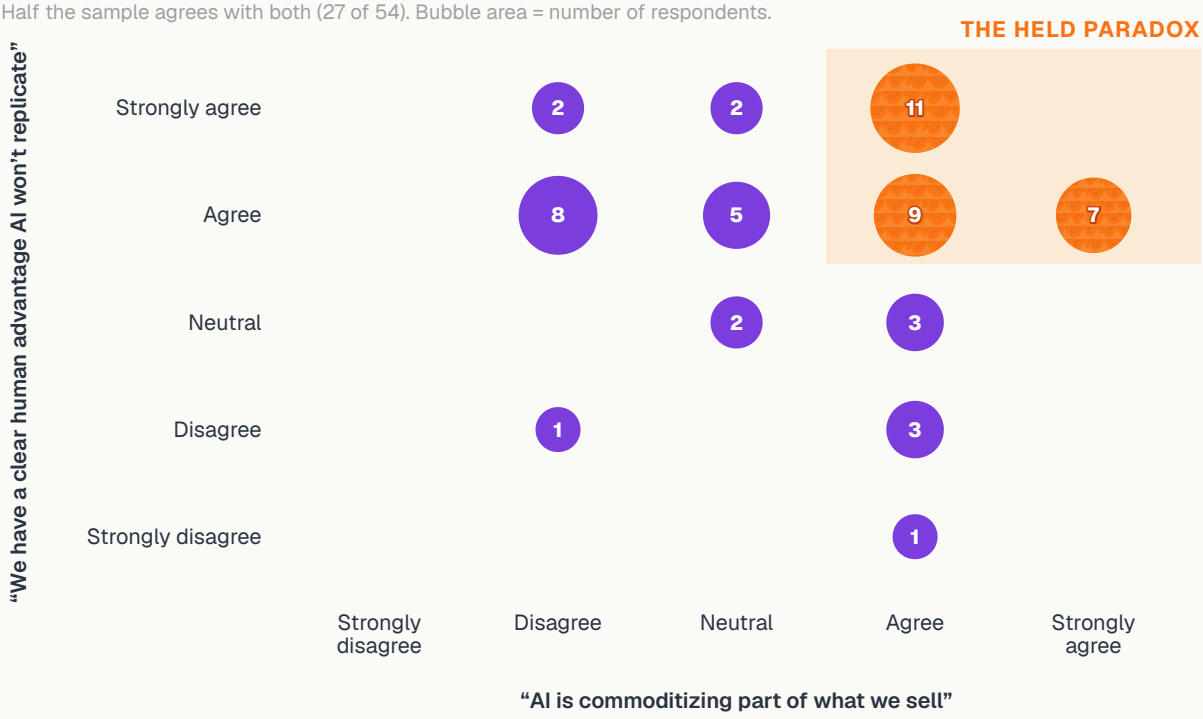
Christine Bookless
FabricAnalytics

SECTION 5

The Held Paradox

Agencies feel commoditized and defensible at once

Half the sample agrees with both (27 of 54). Bubble area = number of respondents.



Source: Agency & Consultancy Research 2026.

Ask agencies about AI and you get two answers that don't sit well together. The first is that AI is collapsing some of the work, commoditizing execution tasks that agencies sell to clients. The second is that they believe AI can't touch what actually makes them valuable to clients. Most don't pick one side or the other; they hold both views.

The numbers bear this out. 63% agree AI is commoditizing a meaningful part of what they sell. 81% say they hold a human advantage that AI won't replicate. Half of respondents agree with both at once.

This isn't a split between doomers and optimists that averages out. The human-advantage belief is near universal, and it doesn't bend to the threat. The agencies who feel commoditization hold it just as firmly (79%) as those who don't. The threat-believers aren't a separate camp betting against AI; they're the same firms accepting the erosion and backing the part AI can't reach.

Brands compare using an agency to an AI-driven CRO tool, but we have yet to see tools do a good job at building and design. There is very little in the way of strategy.



Brian Schmitt
surefoot

Clients will increasingly ask why they shouldn't just hire someone in-house with AI tools. We need a sharp, honest answer to that question, and then we need to actually be that answer.



Matthew Dandurand
ConversionFlow

We are currently in an arms race not just with our competitors but with technology itself. Early adopters are likely to see benefits, but it's not without risks. Long-term success will go to the companies deploying both Brains and Bots.



Michael Weir
IMPRESSION

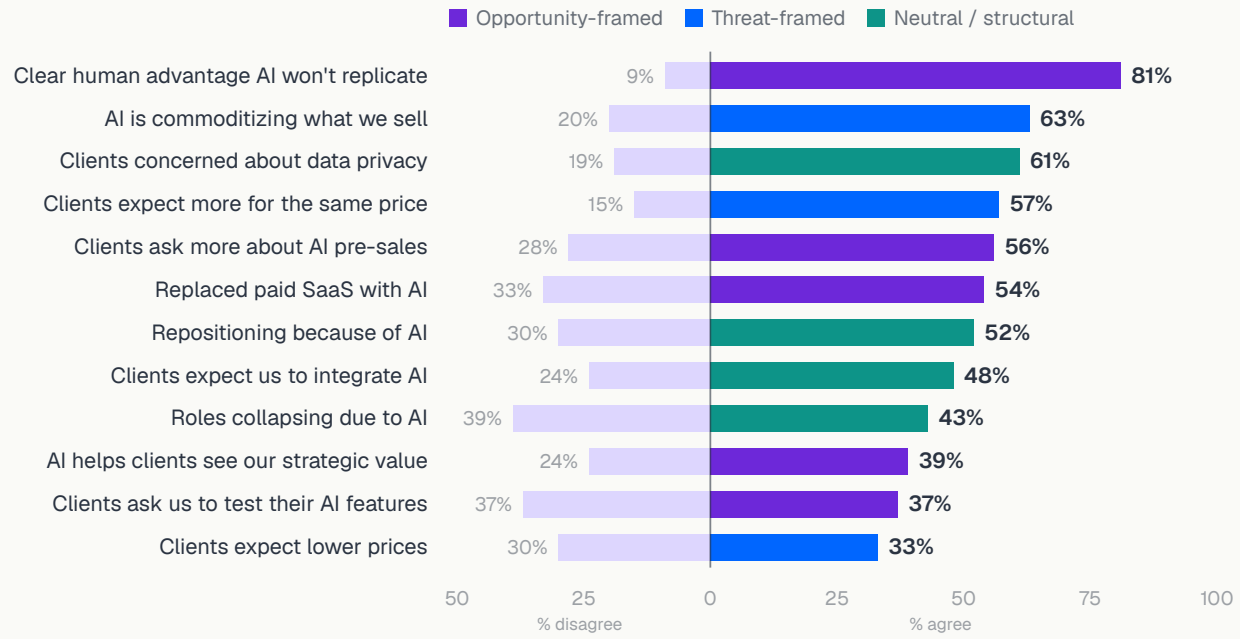
Foxwell Digital and Motion surveyed a different crowd, performance marketing agencies and mostly owner-led, and landed on the same split. Their lead finding is that AI is reshaping what an agency is for, and they put it bluntly: "the fear is commoditization, not automation." Agencies aren't afraid AI will do the work; they're afraid it will erase what they charge for, while in the same breath, they call it their biggest growth opportunity. The two-handed posture shows up in this report too.

Foxwell uses a different population, recruitment and questions, so this corroborates the shape of the finding, not any specific numbers. They do part company on one thing, and it's not small: their agencies rank AI as the single biggest risk over the next 12–24 months. Experimentation agencies don't - their top risks are winning and keeping clients, with AI a notch below.

Zoom out from those two beliefs and the paradox sits inside a whole range of them.

Threat and opportunity beliefs are both widely held

Net agreement with statements about AI and client work, by framing (% agree or strongly agree).



Source: Agency & Consultancy Research 2026.

Three things worth calling out. AI isn't only changing the work. 54% have replaced paid software using AI tools, so it's eating parts of the tool stack, with implications for SaaS vendors.

A new market is forming too - 56% say AI now comes up in pre-sales conversations, 48% say clients expect them to build AI into the client's own workflows, and 37% are already being asked to run experiments on AI features the client owns. AI is reshaping demand as much as it's eroding the old work, which is where this report ultimately lands.

And for all the hype and momentum, the single most widely held client AI attitude is caution. 61% report clients are worried about data privacy and compliance. This again underlines the need to consider open-source and local models.

The adoption of AI is real, but a fifth of agencies still use AI on three tasks or fewer, and over a quarter have added no new services this year, despite the growth talk.

Voice of Agency

The open text answers sharpen the insights in three ways. Repositioning to higher-value work is the single most common change agencies report in how they sell. 30% describe moving up the value chain. But it is loud in the message and quiet in the operations: only 9% say AI has actually delivered significant gains.

For now, the move to higher value lives in how agencies position and describe themselves, ahead of what AI has done to them. Read it as stated intent, not always as a finished change.

> **We have widened our message. Since being part of a larger organisation, we can broaden the customer experience conversation to look at other technology... We speak less about 'CRO' and more about optimising the customer experience.**



Garret Cunningham
Columbus

Secondly, the human advantage that 81% endorse is something they rarely spell out; only around one in five volunteer it unprompted in their “Impact of AI” answers, and almost never in how they describe their pitch or value proposition.

When they do name the human advantage they hold, it comes down to several things: judgment, expertise, and oversight. Knowing which test is worth running and what a result really means. Experience and contextual understanding the model doesn't have. Eyes that catch what the machine confidently gets wrong. An understanding of the business, client goals and context. Human traits!

Agencies affirm this belief far more readily than they articulate it - and as our conclusion explains, that's exactly the gap to close.

It's ESSENTIAL to me that there's a human in the loop. I catch a LOT of mistakes that come from missed context or hallucinations.



Jon Crowder
Another Web is Possible

It's a sycophant! Without the right prompt engineering, it will often tell you what it thinks you want to know. Or worse, will make a mistake and confidently try to pee up your back and tell you it's raining! Human validation is crucial.



Cathal Saunders
Converted

We have had to push back on some obsessions around AI doing everything for you. The ability for AI to accelerate some menial tasks (i.e. number crunching, data reconciliation etc) can actually hamper the quality of strategy. Sometimes (not always) grinding away at the details is what helps build a great strategic understanding.



Stuart Nelson
LEANCONVERT
Better experiences for everyone

AI continues to help in the synthesis of large amounts of data on the research side. Also helping with the triangulation - however we're still really leaning on the expertise of experienced researchers for the final outputs.



Chris Gibbins
Creative CX

With AI We have been able to speed up and improve our internal ops and ways of working, reducing time and resources needed which has probably been the biggest win. The biggest negative is trying to bring this together internally and govern it.



Christine Bookless
Fabric Analytics

Third, the unease is private. Ambivalence about AI surfaces in a fifth of how agencies describe its effect on them, and essentially nowhere in how they describe clients or their sales story. Private doubt, public confidence.

> Using AI has meant that agencies now rely less on outsourcing work to developers and designers, which I'm not sure I'm entirely comfortable with.



Katie Faulkner
FORJ DIGITAL

> For me it's too early to bet on one thing. The landscape looks different every 6 months. Our job is a) surviving - because most won't, and b) adapting very quickly and frequently as things change. Fundamentally I think agencies are ****** and many (most?) have no idea what's coming at them. I see one of our main advantages being relatively cutting edge and in sync with latest developments.



Johann van Tonder
AWA Digital

Where the paradox shows up: price

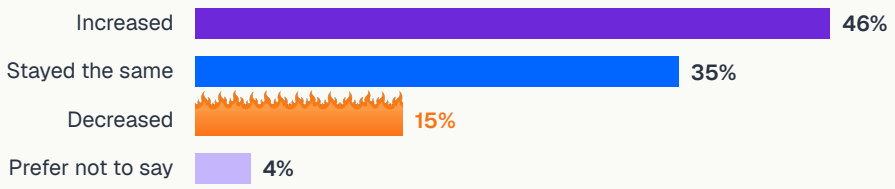
The tension has to land somewhere, and where it lands is price - but not in the way you'd expect. AI hasn't dragged fees down. It has raised what a fee is expected to deliver.

Let's start with the demand side. 57% agree clients now expect faster delivery or more output for the same fee; only 33% report clients expecting lower prices outright. And the capacity to meet that expectation is real: 83% report cycle-time gains from AI. The efficiency is being absorbed as throughput or quality, not handed back as a discount.

The price data bears this out. Over the last year, 46% raised prices and 35% held them - 81% steady or up - against just 15% who reduced them.

Prices mostly held or rose – few cut

Change in prices over the last 12 months. Raised or held: 81%.



Source: Agency & Consultancy Research 2026.

And how agencies charge hasn't moved to match what they sell. Retainers dominate: 80% use them and 72% call them their single largest revenue line. Project work is nearly as common (72% use it) but the biggest earner for only 13%. Performance-based pricing is used by just 9% and is the largest line for only 6%. Agencies sell ROI and bill for time units.

So the efficiency gains from AI aren't reaching clients as lower prices. The obvious next thought is that AI usage is *why* fees rose - "AI made agencies more productive, so they charged more for it". This is the wrong conclusion though, and the next two findings show why.

> **We use AI to drive efficiency, but strategy is human-led. It's a non-negotiable.**
>
> 
>
> **Katie Faulkner**
> FORJ Digital

Why did prices change?

Why prices changed

Top factors cited by the 25 who raised and the 8 who cut.

Factor	Raisers (of 25)	Cutters (of 8)
Strategic repositioning / higher-value	**72%**	**0%**
Client-mix change	36%	12%
Cost pass-through (delivery costs up)	32%	0%
Demand pressure	28%	**75%**
New services	28%	12%
Longer sales cycles	8%	50%
AI-tool competition	8%	50%

Multi-select, up to three factors. Cutters percentages are of a small base (8) – indicative only.
Source: Agency & Consultancy Research 2026.

46% of agencies raised prices over the last year. Asked what drove the increase, 72% indicated moving to higher value work. It's the runaway top factor here. A changing client mix (36%) comes next, then passing through higher delivery costs (32%), with demand pressure and new services slightly behind with 28%.

If you look at the raisers column, fees went up because agencies changed what they sell and who they sell it to, not because costs forced their hand. The cutters column is the mirror image: where price pressure is AI-related, it shows up among the few who cut - not the many who raised. AI pushes fees down, not up.

This list of factors tells you what drove price rises - it can't tell you whether AI shifted that equation, which is the next finding.

> AI is replacing internal people and agencies... CRO is seen as an obvious area to replace with AI



Johann van Tonder
AWA Digital

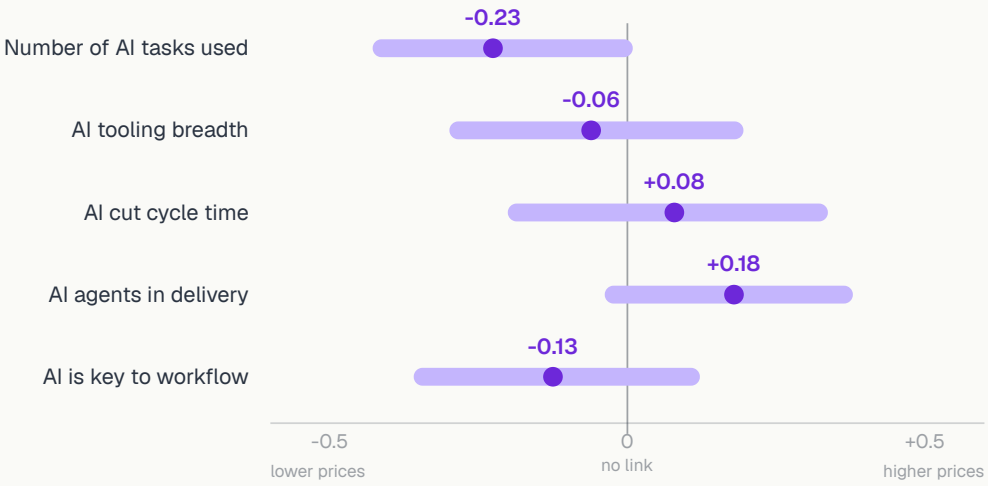
> More competition, less margin



Andy Kobza
Konvertify

More AI doesn't mean higher prices

Every interval crosses zero – no measure of AI intensity links to pricing power.



Kendall τ-b with price direction · bars = BCa 95% CI
Kendall τ-b vs price direction; descriptive, not significance-tested (excludes "prefer not to say").
Source: Agency & Consultancy Research 2026.

Whichever way you measure 'AI Intensity' - breadth of tasks, number of tools, cycle-time gains, agentic delivery, AI's centrality to the workflow - none of it predicts pricing. More AI does not mean higher fees. If anything, there's a weak signal that a larger spread of AI tasks correlates with reduced pricing, but it's not significant.

That closes the loop. The reason fees rose is repositioning. And the only place AI touches price at all is on the way down: among the handful who cut, AI-tool competition is one of the leading pressures.

So the paradox plays out in price. Agencies believe AI is commoditizing their execution work, and they believe their human advantage can't be replicated. Their pricing follows the second belief. They are charging more because they have moved toward the work AI can't do, and the efficiency gains from AI stay in the back office.

43% say roles are already collapsing, with one person now doing several jobs. They can afford to leave it there too: 65% reckon they'd still be profitable if prices fell 10-20%, so absorbing the gains rather than competing them away on price is a choice they have room to make. That is the held paradox turned into a business model. Absorb and roll with the commoditization, sell the judgment instead.

> **Lots of new AI workflows to speed up our processes, but harder to sell CRO into our clients.**



Jarrah Hemmant
precis.

63%

agree AI is commoditizing a meaningful part of what they sell.

81%

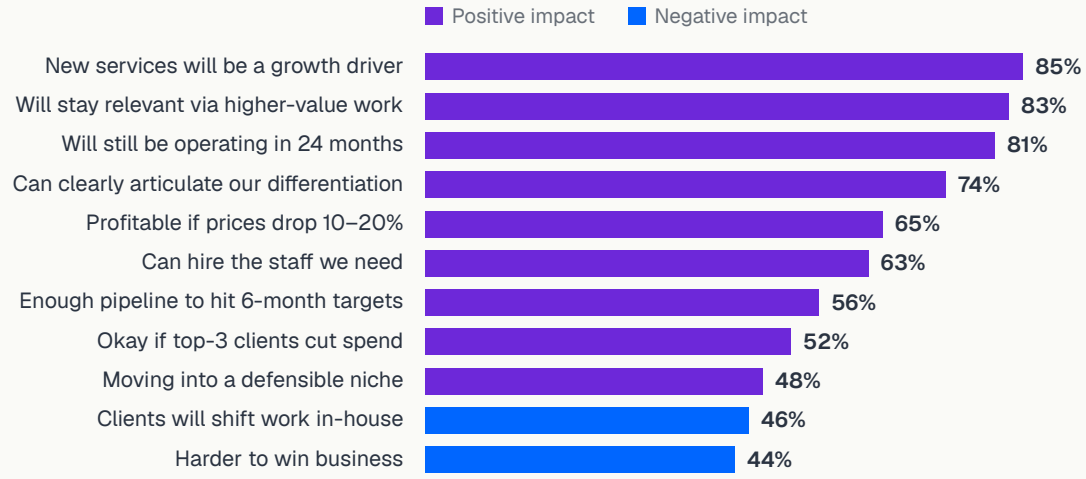
say they hold a human advantage that AI won’t replicate.

SECTION 6

Confident - but the real worry is demand

Confident in themselves, warier of the market

Share rating each statement likely / confident (4–5). Violet = positive for the agency, blue = negative.



Negative-impact items shown as scored – not inverted.
Source: Agency & Consultancy Research 2026.

Ask agencies how confident they are about their own future and the answer is emphatic: 85% expect new services to drive growth, 83% are confident they'll stay relevant by moving to higher-value work, and 81% expect to still be operating in two years. The things an agency controls - its relevance, its growth, its survival - score high.

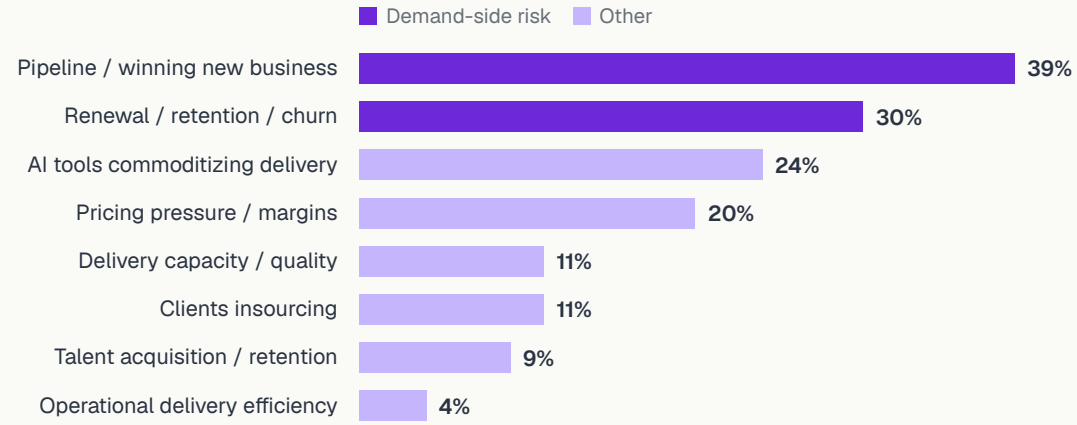
The picture changes as the questions turn to the market. Confidence that they'll hit their six-month pipeline drops to 56%, and the two market-structural reads point the other way: 46% agree clients will shift work in-house and 44% that it'll get harder to win business.

And there's one soft spot in their self-belief. Only 52% say they'd be okay if their top three clients cut spend, and only 48% feel they've reached defensible ground. For a sector that is sure of staying relevant, the soft spot is interesting.

What do agencies worry about?

The top risks are about demand, not AI

Top risks for the next 12 months (multi-select). Winning and keeping clients outrank AI commoditization.



Source: Agency & Consultancy Research 2026.

The two risks agencies name most are about clients: 39% put winning new business at the top, 30% retention and churn. AI commoditizing delivery sits well behind at 24%, almost level with pricing pressure (20%).

Insourcing is an interesting one. Only 11% rank clients pulling work in-house as a top risk, even though 46% agreed, a moment ago, that it's actually happening.

They see it coming; they just don't fear it. It reads as a market condition to work with, not a threat to survival.

> **I think it has really slowed sales as companies are looking to AI to solve so much, not realizing the human layer that still needs to be applied.**



John Gentle
Roboboogie.

And the worry isn't spread evenly – it sits hardest with the smaller, more client-dependent shops. On the agency-type split, dedicated CRO specialists are markedly less sure they'd weather their top three clients pulling back (36% against 66% of multi-service agencies)

and far more likely to name retention as a top risk (40% against 21%).

Scale tells the same story: confidence on pipeline and client concentration both rise with team size and test volume. The demand anxiety, in other words, concentrates where the client base is narrowest.

> **I can close business if I can get in the room, but getting in the room is the challenge.**
>
> 
>
> **Jon Crowder**
> Another Web is Possible

Where is the growth?

We asked what was the one thing that would make the biggest difference to future growth.

What would make the biggest difference?

Open-text answers (Q25), coded into themes · base 52.

Theme	% of respondents
Demand – win, keep or upgrade clients	**40% (21)**
Build the machine (efficiency / product)	25% (13)
Sharpen what we sell (positioning / services)	23% (12)
People & org readiness	15% (8)
External / macro	4% (2)

Single-coder, multi-coded (a response can touch more than one theme), so shares sum above 100%. Base 52 of 54 (2 answers uncodeable).
Source: Agency & Consultancy Research 2026.

Ask it the other way round, not what they fear but what one thing would help most, and the answer doesn't move. Demand again: 40% discuss winning, keeping or upgrading clients and everything else trails.

Building the delivery machine comes next (25%) then sharpening the offer (23%) and shoring up the team (15%). One respondent, a dedicated CRO agency, compressed the whole worry into a line: "...clients will increasingly ask why they shouldn't just hire someone in-house with AI tools."

None of this means AI is harmless. Agencies feel it: 63% say it's commoditizing a meaningful part of what they sell, and a quarter name it as a top risk.

The point is narrower and more useful. When agencies rank what actually threatens them, AI sits third, behind the two pressures that have defined agency life for as long as agencies have existed: winning work and keeping clients. AI is a real new entrant on the risk list. It just hasn't displaced the old ones.

A separately recruited study lands in the same place, with one exception. Foxwell and Motion's 2026 agency research put AI at the very top of their risk list; in ours, it sits mid-pack, well behind demand. Different crowd, different questions, so the contrast is directional, not head-to-head – but worth saying plainly: their agencies are most afraid of the technology; ours are afraid of the market.

AI isn't the worry, it's an enabler for ways to compete with other agencies, not the whole system. So diversifying concentrated client risks, repositioning to higher value services, building demand and meeting in-housing as an opportunity, rather than a risk, is what the best agencies are doing.

> **One thing that would make the biggest difference to growth: A more holistic mindset beyond experimentation. Experimentation is too zoomed-in vs what is now possible and needed for clients.**



Jacob Parazo
arkyard

39%
put winning new business at the top

30%
retention and churn

SECTION 7

What the smart agencies are doing

The start of this report sets out the problem. This section is the shape of the answer: not a prescription, because the data doesn't give one – but the pattern points clearly one way. AI has lifted the floor of what every agency can do, and competing on that floor is a slow race to the bottom.

The move is to bank the productivity AI brings in the back office, where it already runs deep, and spend it on the thin human edge at the client-facing end, where it doesn't reach. Treat AI as augmentation, not the product.

This is a theme that we explored in the AI Playbook back in 2023, and the evidence is that rewiring and augmenting workflows with human skills is where the gains are to be found. Whether it's human-in-the-loop or human-on-the-loop, the contribution of 'meatware' to the work of experimentation agencies remains critical. This also allows time to be spent on more quality thinking, through automation.

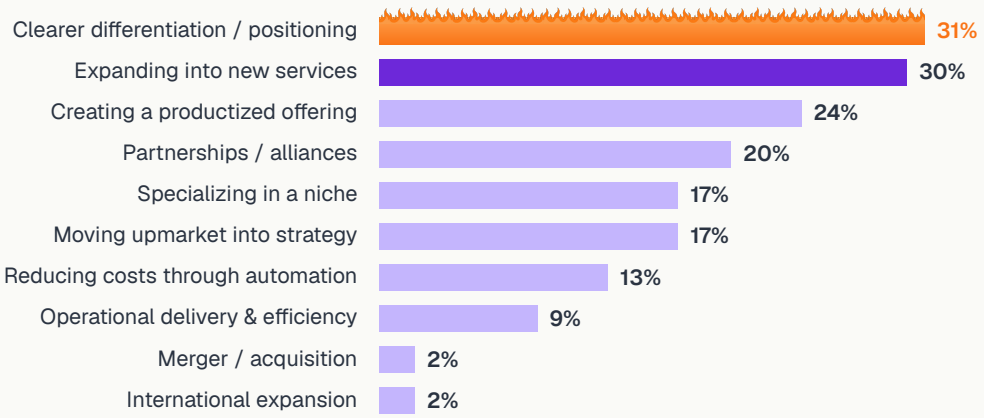
> **We are using AI to build automated, standardised agentic workflow versions of our processes to improve efficiency and consistency (e.g. forecasting). And with the reclaimed time, improve our ability to provide clients with strategic vision, growth planning, problem solving, and intelligent measurement.**



Joe Johnston
Launch!

Differentiation and new services lead the growth agenda

Top growth levers for the next 12 months (multi-select). Drastic moves – going upmarket, niche – trail.



Source: Agency & Consultancy Research 2026.

When we asked agencies for their top growth levers for the next year, we had a mixture of shifts as well as moves upwards. The two most named growth levers are clearer differentiation (31%) and expanding into new services (30%) - reframing and broadening what they already do.

Productized offerings (24%) and partnerships (20%) come next. The shifts upwards, moving upmarket into strategy or specialising in a defensible niche, sit lower at 17% each. Cutting costs through automation is lower still at 13%.

> **We are trying to make our own processes leaner and smarter than before, using AI wherever there is a real value, not everywhere. This gives us more space to help our clients strategically.**

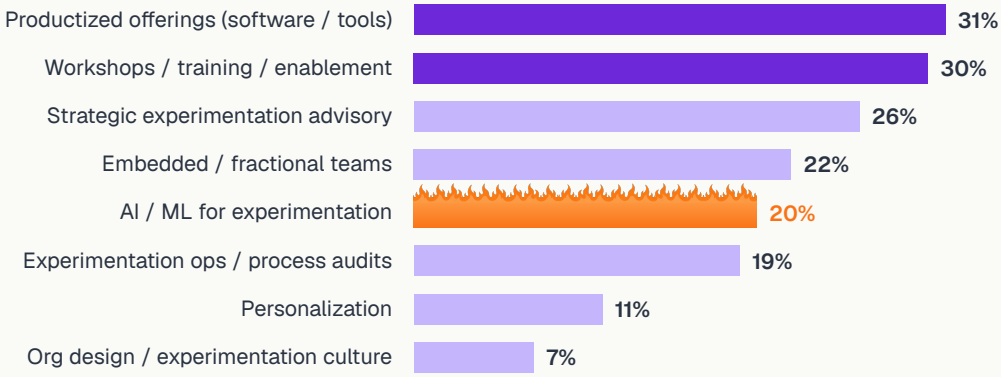


Sebastian Bernhardt
TRKKN

So what new services did people offer over the last year?

Agencies expanded around the offer, not deeper into testing

New services added vs a year ago (multi-select). 28% (15) added none; AI as a sold service trails its internal use.



Source: Agency & Consultancy Research 2026.

Let me give you some concrete definitions or examples:

- **Differentiation** - This surrounds branding, differentiation, positioning, brand and GTM strategy - where the agency has a clear point of difference in terms of approach, technology or capabilities. A good example of this is Lucia van den Brink with “The Initial” agency, selling ‘owning rather than renting’ experimentation capability and there are other agencies following this model. This is just one direction you can take; other agencies specialize in a niche or vertical (for example, Shopify, Ecom or Fintech).
- **Productized offerings -** We know of several agencies who are working on or have launched their own products, to sell at the commodity end of the market but at a higher scale. A good example here is the tool Lupine, launched by GAIN Conversion. These products are the new floor in agency offerings; humans cost more.
- **Strategic experimentation advisory -** This is where agencies are moving into higher value consulting, helping companies to grow culture, velocity, quality and apply governance - teaching them how to get better at running experimentation themselves - a whole range of enablement consultancy.
- **Embedded / fractional teams** - This is a service available from several agencies, where a CRO team or function is supplied as an embedded resource deployed within a company, or for a period of knowledge transfer.
- **AI/ML for experimentation** - Clients are asking agencies about how they are using AI tech, but they’re also asking for help with AI integration, features and workflows - including running experiments with AI features to measure efficacy.
- **Experimentation Maturity / Ops / Process audits** - I am very glad to see this growing over the last few years, because a lot of experimentation orgs do not benchmark what they are doing. This leads to lots of problems that are invisible, unless you have an objective and thorough evaluation of your experimentation program. We don’t have the

benefit of peer-review in most AB testing, because organisations understandably don't publish the data. How do you check if you're doing it wrong? Get an audit!

- **Personalization -** Not a high figure here; it perhaps underlines the variable results companies have had from investing in this area. Not the fault of the technology; it's often because it's simply not treated as another set of experiments, but as a standalone initiative. Personalization simply remains 'another set of hypotheses' to be turned into experiments.
- **Org Design and Experimentation Culture -** Mentioned by only a few respondents, it's still good to see this. Consultancy in this area may be the highest value work, operating at the intersection of commerce, operations, HR, org design, strategy, customer services, CRM and data integration.

> We created and launched a product to support CRO and now it's growing by itself.



Jim Martin
Align Digital

> Changing our angle from 'we'll run experiments for you' to 'we'll help you integrate experimentation into your decision-making process.



Lee Preston
CTI DIGITAL

And the value climb is talked about more than it's taken: 52% say they're repositioning their agency because of AI, but only 26% lead with a 'strategic' identity when asked how they actually position themselves. Differentiation runs the same gap: 74% are confident they can clearly articulate why they're different, yet clearer differentiation is the single most-named growth lever!

They're sure they stand out, whilst simultaneously naming standing out as the thing they most need to fix. For many, finding higher value is a line in the pitch more than a place that's actually been reached.

> **Everyone is claiming AI expertise ... It's made differentiation much harder because the signal-to-noise ratio in the market has collapsed**
>
> 
>
> **Jon Crowder**
> Another Web is Possible

The strongest agencies are the ones making the move deliberately, and four things separate them that aren't just about pipeline.

The first is to climb the value ladder for real, by owning strategy rather than relabelling execution as strategy. The quarter who already lead with strategy have done what the rest are still describing.

The second is to reduce client concentration, the soft spot from the last section. The agencies that sleep soundly are the ones least dependent on a handful of clients.

The third is to meet in-housing as a partner rather than a rival. Clients are pulling work in-house and agencies can see this trend. So the ones who treat it as a market to enable, through strategy work - helping with growth, culture, process, tool selection, governance, democratizing and expanding experimentation within these companies - turn a visible threat into a service line.

Lastly, seeing AI as an opportunity to find new demand from clients for experiments, tooling, automation, agentic workflows is available to those who build their experience in this area. Once you start building this stuff yourself, you gain experience that becomes invaluable to clients.

It's the same direction agencies point to when asked what would help most: build the delivery machine (25%), sharpen the offer (23%), invest in people (15%). The levers exist. The question is whether agencies pull them on purpose.

Foxwell and Motion's 2026 agency research reaches the same conclusion. It names owning strategy over execution, and becoming a growth advisor rather than a channel operator, as the leading growth opportunities for their agencies. Same move up the value chain, different population.

We're of course also talking about AI but not just about how we use it to improve our experimentation practices, but on how we help clients experiment with AI, how they trial it, test it, experiment!



Chris Gibbins
Creative CX

Like a lot of companies, we have moved more towards A.I and consultancy rather than doing the **execution** work.



Adrian Grindley
UserBoost

We've pivoted from 'CRO agency' to 'Strategic Experimentation Advisors', as many companies use AI to set up their testing efforts on their own.



Fotis Antonopoulos
CONVERSION RATE Greece

Conclusion - The Floor and the Edge

AI is now the floor, not an edge. Every agency in this study uses it, and most use it across half the tasks in the experimentation workflow. Very few have turned that into a distinct advantage. Wide adoption is easy to see in the data, but deep operational use is rare, and that gap is what will decide who grows in 2026.

A year ago the sector saw AI as an existential threat in some ways. In practice it turned out to be a useful toolkit. The pressure that actually worries agencies is the one that has always worried them: demand. They are confident in their craft and confident they will stay relevant. What they don't know is where the next client comes from.

The agencies pulling ahead use AI in a particular way. They bank the productivity it gives them in the back office and spend it on the parts of the job AI can't do well: judgment, strategy and the client relationship. They accept that execution is being commoditized, so they absorb this and sell their human advantage.

None of this is settled yet. It's one snapshot of a community in the middle of a change, and next year's data may look different. The direction is clear enough though. The floor is rising for everyone, and the only real choice left is what you do with the time AI hands you back.

A warning though. This story (of variability in efficiency gains) is not unique to the experimentation agency world - gains are highly uneven depending on task and context, so any gain only lands on limited parts of a workflow. It's those orgs that are rewiring the very way they work who see the largest gains, rather than those that point optimise an existing workflow.

There's a huge underlying problem that we need to discuss here though. Most companies are only seeing gains in limited areas, transformational gains are rare, usage isn't metered, ROI is rarely calculated. Why does all this matter?

You are using AI models right now, to do work units or tasks. If you're using a frontier model (the usual big companies) then this cost is highly subsidised. If you do any study of the economics here (Gary Marcus, Cory Doctorow and Ed Zitron are my faves on substack) then you understand that the products we are using now are just a mirage.

In a great article by Michal Malewicz, we see a hint of the future. Remember when that chocolate bar reduced in weight? Or the price rose on your internet access? Remember when Uber jacked their prices higher? Cory Doctorow has a name for this, when products turn to extraction rather than unfettered growth.

So 2026 is where prices rise and discomfort is applied to AI tech. It is much better to have less users on free or low cost tiers - there is no profit there. Much better to have less users but have most of them on a pay-per-token model. When it was cheap and unconstrained, it made sense to try out new things, experiment, vibe code that app ;-)

"Intelligence will be metered" said Sam Altman and this seems to be the trajectory here. Michal Malewicz uses an analogy of 'boiling a frog slowly' but this only works if the frog doesn't **notice** it is being boiled.

I imagine a lot of people **will** notice an increase in costs, some will not but the profit maximization will continue. So prices are going to rise now and in the future - or after a 'market correction', prices will also rise. Either way, the subsidised usage is going to vanish at some point, so you will inevitably pay more than you do now, for the same output.

The logic problem gnawing away at this market is the level of discomfort and cost they will have to apply, to become profitable, to repay the VC cash and circular debt - is too high a price to pay for the rest of the world. The frog will jump out of the pan to alternatives (local, hosted, cloud, open source) and the core AI players may well collapse or radically change. The demand is simply not there to pay the price that is sought, to pay for all this.

So AI usage is a business risk for agencies to manage too:

(a) The cost of your systems, apps, wrappers, projects or agents could rise dramatically in future

(b) Your stuff might stop working because of model nerfing or your model being discontinued

(c) Your AI model provider goes out of business or changes terms

If one of these happens, are you prepared?

A good first step is to start metering AI usage and associated costs (talent, tech, tokens) so you know **before** your ROI changes dramatically. What used to be cheap, could become quite expensive for some tasks, so **watch it.**

Many businesses that use AI as a wrapper, may find their tech or their whole company cannot survive, if model costs rise significantly. Some companies may not prepare for the model changing on some key part of AI tech they rely on for a workflow. My advice to you is to **be prepared**.

I hope you enjoyed reading this year's report. Please send any questions (or critique) to me (Craig Sullivan) via LinkedIn.

If you found it useful, could you give us a testimonial?

The breadth is universal, the operational depth is rare, and the gap between the two is where 2026 is being decided.

SECTION 8

Methodology

This report draws on a survey of 55 CRO and experimentation agencies and consultancies, collected via a Paperform survey tool, between February and May 2026 and recruited through the author's and sponsors' network. It is a self-selected, non-probability convenience sample, not a random sample of the agency population, and it over-represents practitioners engaged with experimentation content online. Findings are indicative of this community.

Almost all analysis runs on a working frame of 54 - excluding one Development & QA agency as outside the experimentation-agency scope.

Skip-logic questions carry smaller bases – pricing factors, for instance, rest on the 33 respondents who changed prices. Where a base falls below ten, this is flagged in the document.

Relationships between variables are measured with Kendall's τ-b, appropriate for the ordinal and banded data here, with 95% confidence intervals from a bias-corrected bootstrap and a Benjamini–Hochberg correction where families of comparisons are tested.

At this sample size, subgroup cells get small quickly: differences by agency type or size are reported as exploratory associations and read as hypotheses, not proven effects, and we make no causal claims from cross-sectional self-report.

The 2025–2026 comparison is a directional contrast between two different snapshots – different respondents, recruitment and data collection so carries no significance or trend claims. The four open-text questions in the 2026 survey were coded into themes with human adjudication (single-coder, multi-coded, keyword cross-checked).

Claude was used to clean and transform the survey data with human adjudication. It was also used for an initial document scaffold and as a harness for the data analysis work. Lastly, it helped to manage the coding of open text responses, PII handling and quotation approval for the final document. No, it didn't write the report, I did, so this may be a disappointment to some. Useful but not fundamentally transformational - a good servant but a bad master. The analysis was improved by using AI but did not *replace* the analysis or thinking, which fundamentally underpinned the work.

Get connected



Fotis Antonopoulos
Founding Member, AI Academy
conversionrate.gr



Amrdeep Athwal
Conversions Matter
conversionsmatter.com



Sebastian Bernhardt
TRKKN
trkkn.com



Christine Bookless
Fabric Analytics
fabric-analytics.com



Jon Crowder
Another Web is Possible
anotherwebispossible.co.uk



Garret Cunningham
Columbus
columbusglobal.com



Matthew Dandurand
ConversionFlow
conversionflow.com



Katie Faulkner
FORJ Digital
forj.digital



John Gentle
Roboboogie
teamroboboogie.com



Chris Gibbins
Creative CX
creative-cx.com



Adrian Grindley
UserBoost
userboost.co.uk



Jarrah Hemmant
Precis
precis.com



Joe Johnston
Launch
launchonline.co.uk



Andy Kobza
Konvertify
konvertify.hu



Ben Labay
Speero
speero.com



Jim Martin
Align Digital
aligndigital.co.nz



Stuart Nelson
LeanConvert
leanconvert.com



Jacob Parazo
Arkyard
arkyard.com



Lee Preston
CTI Digital
ctidigital.com



Tasin Reza
Echologyx
echologyx.com



Cathal Saunders
Converted
converted.co.uk



Brian Schmitt
Surefoot
surefoot.me



Ryan Thomas
Koalatative
koalatative.com



Johann van Tonder
AWA Digital
awa-digital.com



Vassilis Tourtouropoulos
Jellyfish
jellyfish.com



Michael Weir
Impression
impressiondigital.com



Greg Wendel
Drumline Digital
drumlinedigital.com.au



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