



**DATA & AI
HUMAN CAPITAL
REPORT**

Retail edition 2025

About the Darwin X Data & AI Index

The Darwin X Data & AI Human Capital Index measures the proportion of a company's workforce dedicated to Data & Artificial Intelligence functions. Utilizing advanced technology developed by Darwin X, the index collects and processes millions of publicly available data points.

Each company's workforce is assessed to quantify and categorize four fundamental Data & AI roles. Retailers are then scored on a 0 to 100 scale based on the proportion of their total internal workforce dedicated to each role. A higher proportion indicates a greater strategic emphasis on a particular role.

Find out more about the index
<https://www.darwin-x.com/index/>

Disclaimer: This index does not evaluate the impact or effectiveness of a company's AI-powered initiatives. It focuses solely on the relative workforce strength in Data & AI roles.

- The Data & AI Human Capital Index measures the relative strength of the world's largest Retailers talent pools.
- In this study, we analyse over 50 top retailers from the two primary contributing regions to global retail sales (North America and Europe).

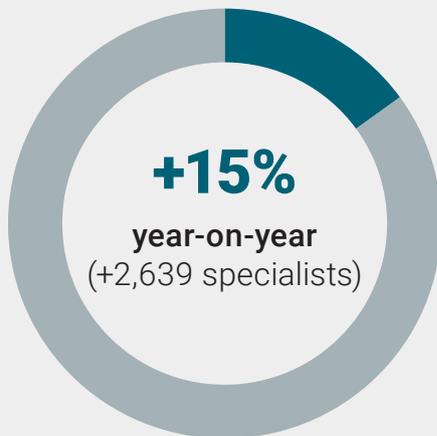


Data and AI capabilities are no longer a differentiator – they're a race. And the race is accelerating.

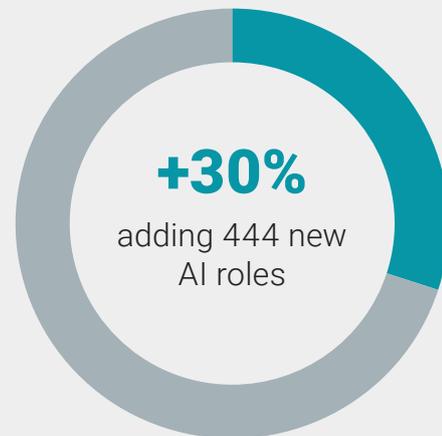


Retailers worldwide are expanding their Data & AI talent pools at breakneck speed to secure long-term competitive advantage. Over the past 12 months, across the 50+ global retailers we analyzed:

Total Data & AI talent has grown by



AI-specific profiles have surged by



We also see a clear strategic shift from data enablement to AI execution, with a growing share of AI engineers, as well as roles in ML ops and applied AI.

Winning in Data & AI in the future will require:



Focused AI hiring plans across **engineering, product and applied AI**



AI-native operating **models**, not just data maturity frameworks



Acceleration of AI **productization to extract business value**

Note: Data based on a top 50 global sample

1 Leadership reshuffle: New champions emerge



Jumps to

#1 GLOBALLY

adding +85 specialists (+27%), with significant net increase across Data Science, Engineering, and AI

SEPHORA

Climbs from

#11 TO #5

with a net increase of +44 specialists (+24%), including 17 AI profiles



Advances from

#19 TO #10

with a net increase of +46 new hires (+30%)



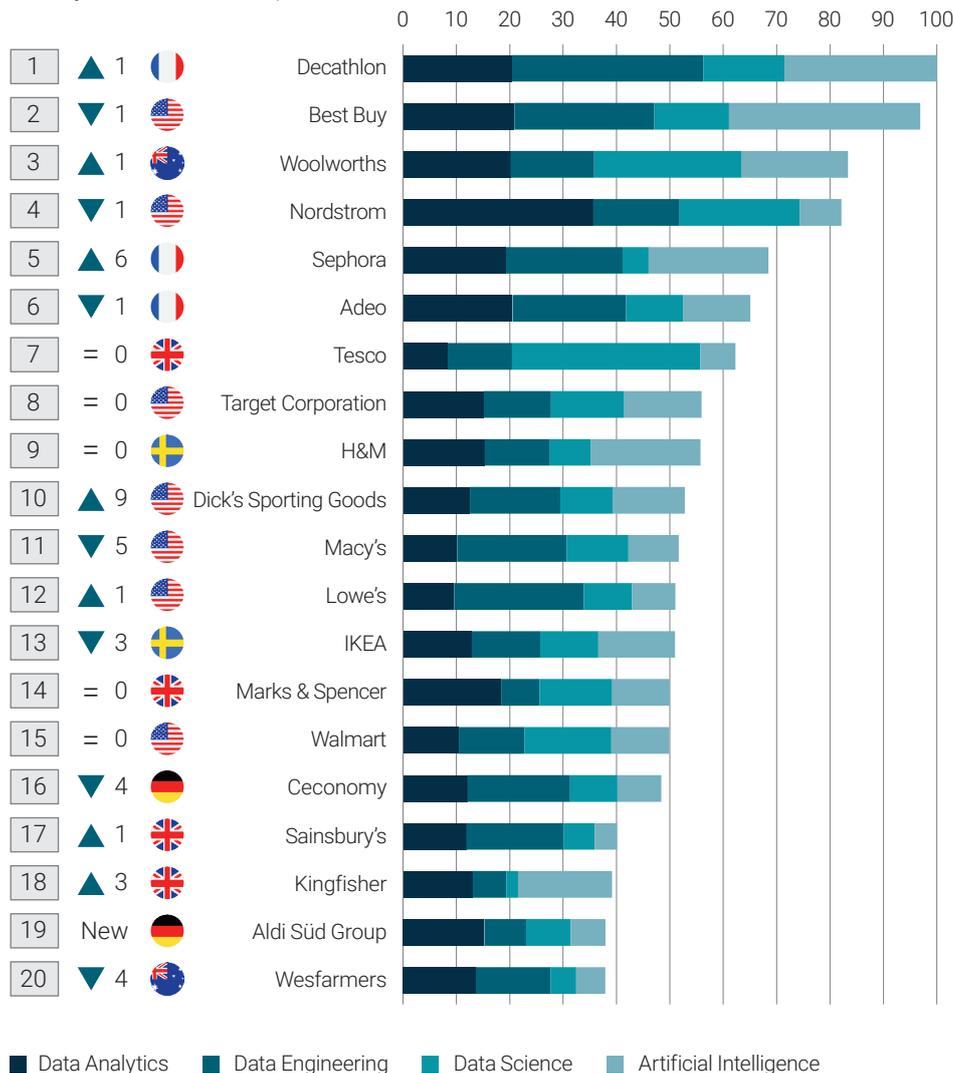
Drops from

#6 TO #11

with a net loss of -11 specialists

FIGURE 1: TOP 20 DATA & AI HUMAN CAPITAL RETAIL INDEX 2025

Density of Data & AI talent pool



Source: Darwin X Data & AI Index, April 2025

“

At Decathlon, artificial intelligence is a powerful lever for increasing the human intelligence that makes us collectively more successful and resilient.”

Didier Mamma,
Chief Data Officer &
AI, Decathlon



2 Scale vs. density: Size does not guarantee AI leadership



+900 NEW DATA & AI SPECIALISTS

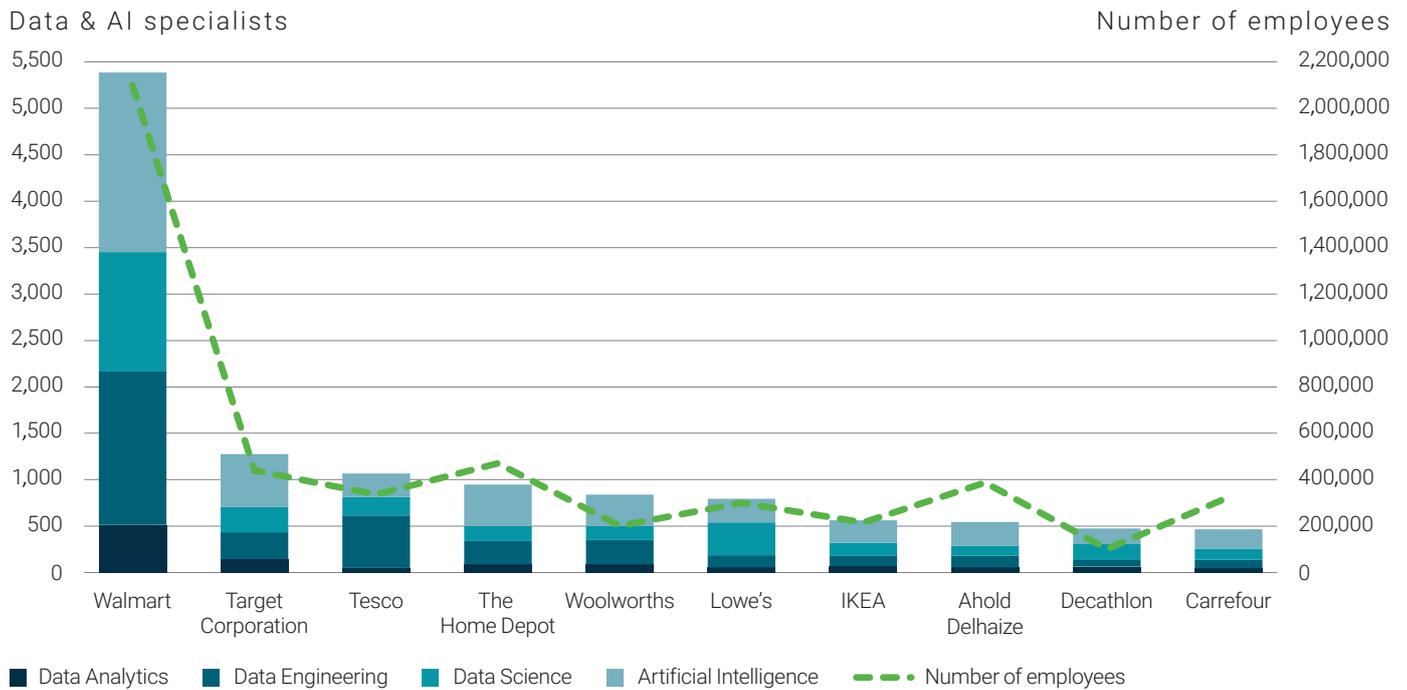
(to reach ~5,400 total) yet remains at #15 due to talent dilution across its massive workforce (~2.3M employees)



CLIMBS TO 10TH PLACE

for the absolute size of its Data & AI internal talent pool, outlining the central role these in-house specialists play within its strategy

FIGURE 2: 10 LARGEST RETAILERS' DATA & AI TALENT POOLS, IN ABSOLUTE VALUE



Source: Darwin X Data & AI Index, April 2025



For the past several years, Carrefour has made Data and Artificial Intelligence a central lever of its strategy, and has been developing a solid in-house team. This expertise is profoundly transforming our key processes – assortment, promotions, personalization – with tangible, large-scale impacts. Its success is based on a unique model: dedicated teams – Data Translators, Digital Factories, AI Transformation – that interface with business and operational teams to guarantee the relevance and appropriation of solutions. Today, we are pursuing our acceleration with the deployment of conversational agents, to make AI part of employees' daily activities and reinvent our customer experience."

Arnaud Grojean, EU Chief Data & Analytics Officer, Carrefour

3 Europe steps forward: France takes AI leadership

The U.S. remains the largest Data & AI talent pool in absolute terms, but France now leads in AI density:



France: 2.1 AI specialists per 10,000 employees



U.S. and EU average: 1.7 per 10,000 employees



U.K. leads Europe in Data Science density, with 4.3 Data Scientists per 10,000 employees



Germany is relatively strong in Data Engineering but limited in AI scale



Spain is still behind on all dimensions

FIGURE 3: EU, FRANCE AND U.S. DATA & AI TALENT POOLS, PER 10K EMPLOYEES

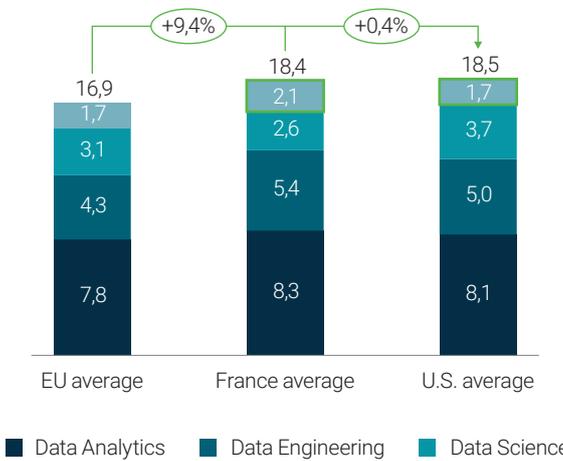
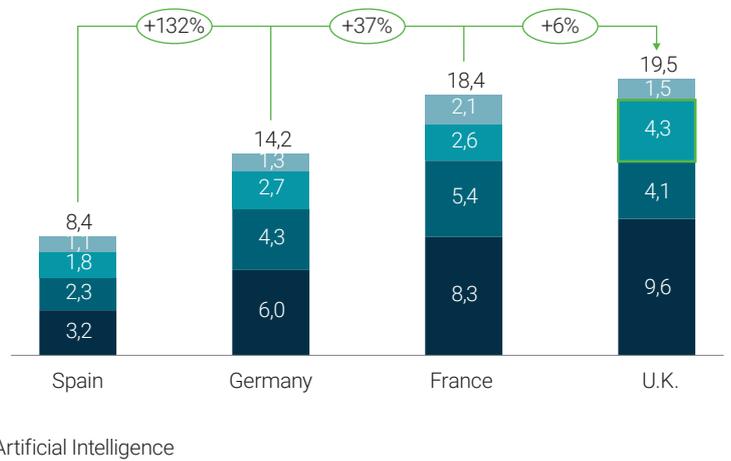


FIGURE 4: COMPARISON OF SPAIN, GERMANY, FRANCE AND U.K. DATA & AI POOLS, PER 10K EMPLOYEES



Source: Darwin X Data & AI Index, April 2025



The comparative analysis of Data & AI talent pools across major European countries and the U.S. reveals a significant shift in the landscape. France's leadership in AI specialist density and the U.K.'s strength in Data Science density are clear indicators of these countries' strategic focus on building robust AI and data capabilities. This trend underscores the critical importance of investing in AI and Data Science to drive innovation and maintain a competitive edge in the global market."

Olivier Abtan, Global Co-Leader of Digital Innovation, Partner & Managing Director, AlixPartners

4 The pivot is clear: AI-first hiring drives the gap

In one year, the total number of **Data & AI specialists** across the panel

INCREASED BY 15%

with 2,639 new specialists, of which 444 are in AI

AI profiles

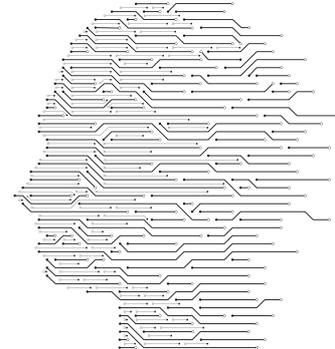
GREW TWICE AS FAST

as the remaining Data disciplines

AI profiles represent

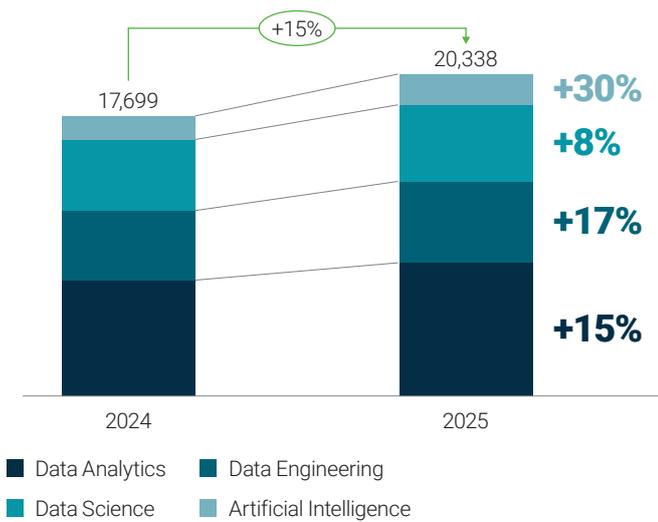
9.5%

of the total **Data & AI talent pool**, vs. 8.4% one year ago



This signals a shift from enablement (data, reporting and analytics) to execution (machine learning, generative AI and applied AI at scale).

FIGURE 5: EVOLUTION OF DATA & AI TALENT POOLS, APRIL 2024 VS. APRIL 2025



Source: Darwin X Data & AI Index, April 2025

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Retail’s top 50+ players are significantly boosting their Data & AI teams, with AI in particularly high demand. This reflects an industry-wide pivot toward more intelligent, tech-driven strategies to stay competitive in an increasingly data-centric market. The growth is even more significant given the current environment, where operational expenses, particularly HR-related costs, are under pressure. It also underscores the crucial importance of building strong Data & AI internal teams to maintain control over strategic, high-impact projects, ensuring agility, ownership, and alignment with long-term business goals.”

Dominique Mary, Founder & MD, Darwin X

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ABOUT DARWIN X

Darwin X is an innovative strategy consulting and research firm. We help our clients solve complex problems bridging business and technology. We are a team with a unique blend of consultants, business experts, tech, data and AI specialists. Our co-founders Dominique Mary and Stéphane Dautel have an extensive track record in digital transformation in the Financial, Retail and CPG industries.

At Darwin X we don't just design transformation, we quantify it. Using proprietary performance indexes and the power of public data at scale, we developed a unique way to benchmark to ensure our clients see real, measurable progress.

In addition to its core consulting activity, Darwin X has developed maturity indices of transformations to help decision-makers steer their activity. Its flagship index measures the performance of actors in terms of digital transformation and its components (Data/AI, Digital Marketing, E-commerce, Software development, Technologies). The present study is based on the content of this index.

ABOUT ALIXPARTNERS

For over 40 years, AlixPartners has helped businesses around the world respond quickly and effectively to their most critical challenges – circumstances as diverse as urgent performance improvement, accelerated transformation, complex restructuring and risk mitigation.

We intervene in critical situations - a sudden change in the market, an unexpected drop in performance, a transaction urgent, a decision to be made quickly. But it's not what we do that makes the difference, it's how we do it.

Dealing with time-sensitive situations is part of our DNA - that's why we continually adopt a time-oriented approach towards action. We work in small, highly qualified teams with specific sectoral and functional expertise, and operate at a steady pace, moving quickly from analysis to implementation. We support our clients from start to finish and measure our success in light of the results obtained.

Our approach helps our clients face and overcome future challenges. We work alongside you and with your advisors to help you to make the right decisions and implement appropriate actions. "When it really matters".

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