

ADAPT – OR DIE!

IN 2026, AI WILL TRIGGER A SYSTEMATIC SHIFT IN
MARKETING – redefining roles, tasks and realities for good



A SYSTEM RESET FOR MARKETING.

We are living in a time of constant acceleration. Every few months, the rules seem to change – economically, politically, and technologically. But one thing is clear: the marketing system as we knew it is being rewritten.

AI is no longer a buzzword or a side project. It has become the backbone of modern marketing: transforming processes, reshaping roles, and demanding new skills from everyone, especially CMOs. This year's study makes one thing unmistakably clear: AI has become a leadership task. It's not just about tools and automation, but about vision, direction, and the ability to connect people, creativity, and technology.

I believe that those who approach this transformation with curiosity and courage – who learn, experiment, and lead their teams through it – will define the next era of marketing. Not by chasing every new trend, but by linking technology with human insight and creative ambition.

And in times of such fundamental change, one thing remains essential: collaboration. Because no one can navigate this transformation alone. Only together across teams, disciplines and borders, we can unlock the full potential of what's ahead: **TOGETHER WE ARE UNLIMITED.**

So yes, the system is updating. Let's make sure we're the ones writing the new code.

FLORIAN HALLER





STUDY PROFILE

DURATION

9 min

median completion time

SAMPLE SIZE

N = 805

DE=192 AT=28 CH=153
BE&LUX=42 NL=107
ES=38 FR=32 IT=91
UK=47 ME=56
NORDICS=19

LOCATION

Europe

(incl. Middle East)

SAMPLE

CMOs / Marketing
decision makers

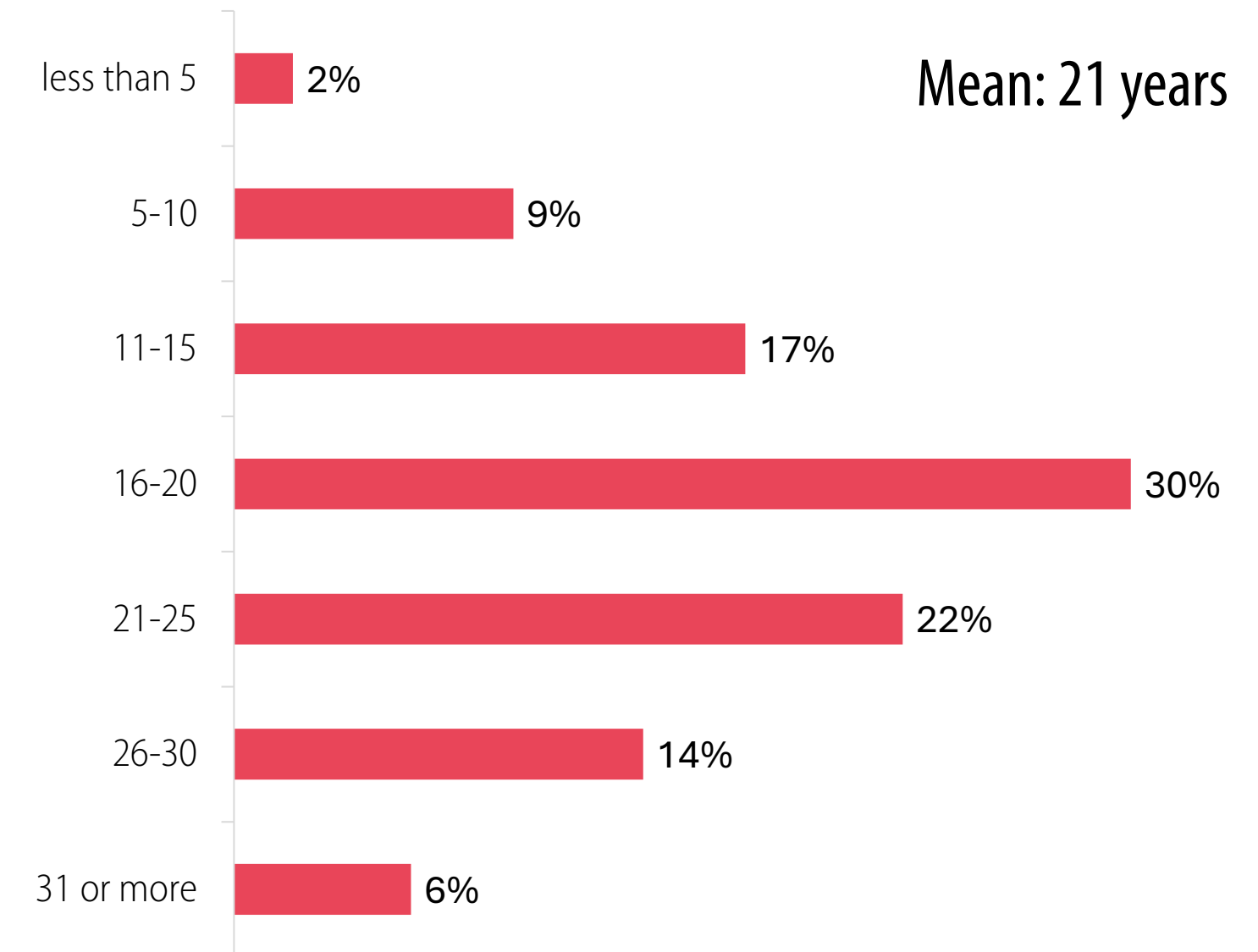
FIELD TIME

September 3 – 25 2025

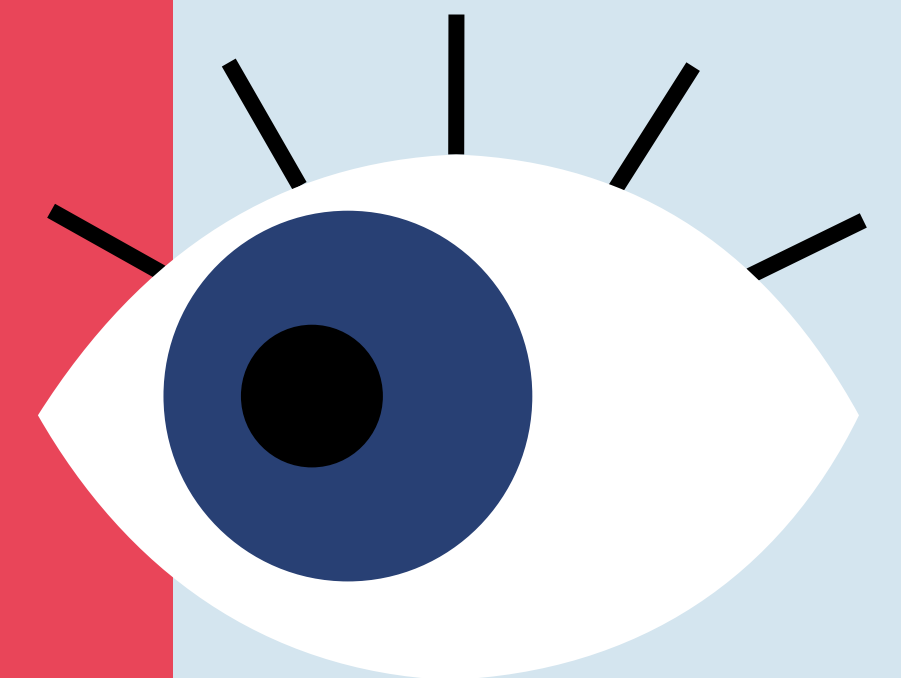
METHOD

Online survey

Experience:

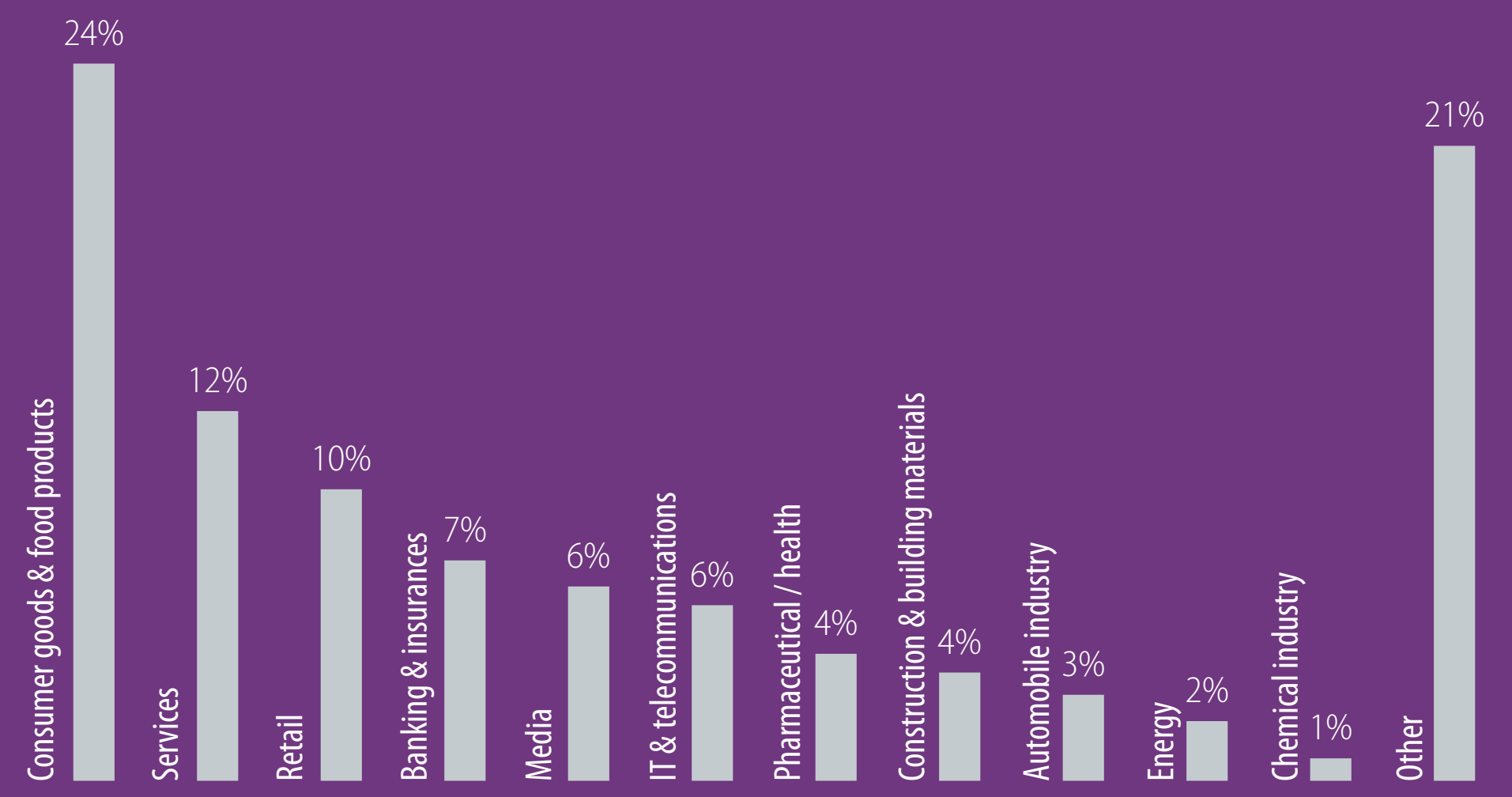


QUESTION: Approximately how many years have you been working in marketing? Base: N = 805

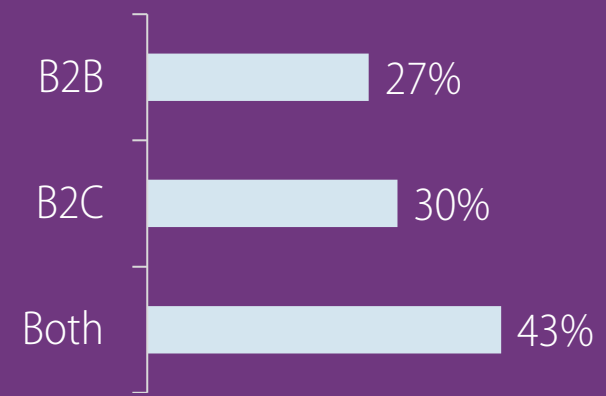




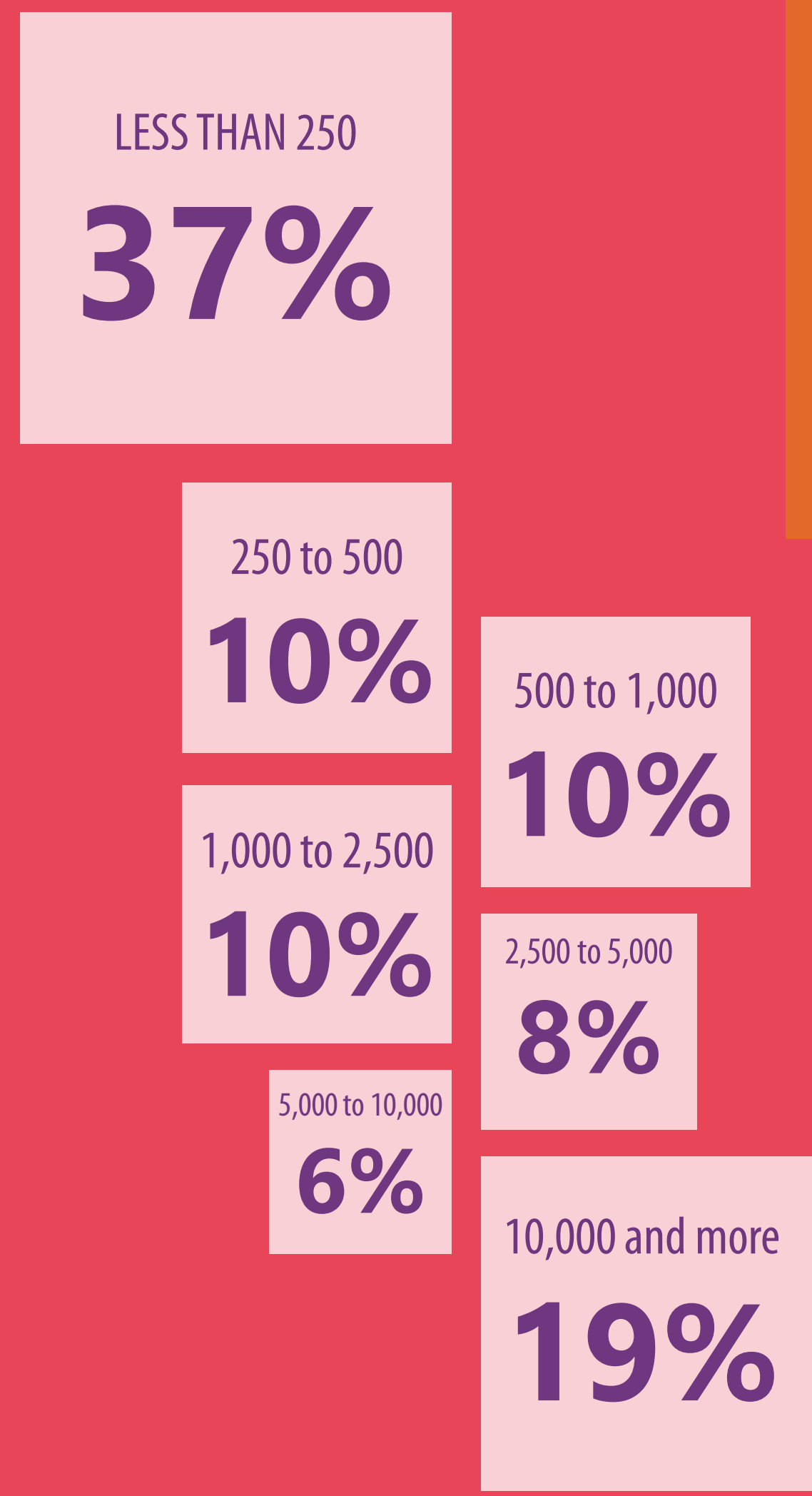
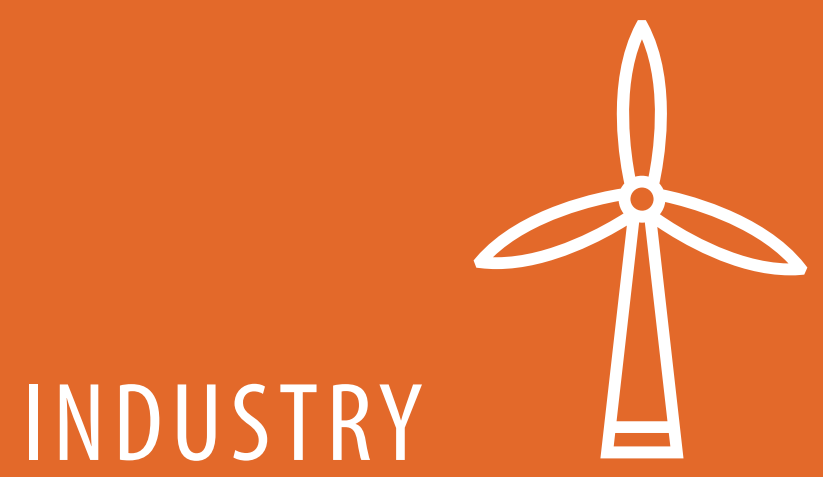
SAMPLE DESCRIPTION



QUESTION: In which industry is your company active?
Base: N = 805

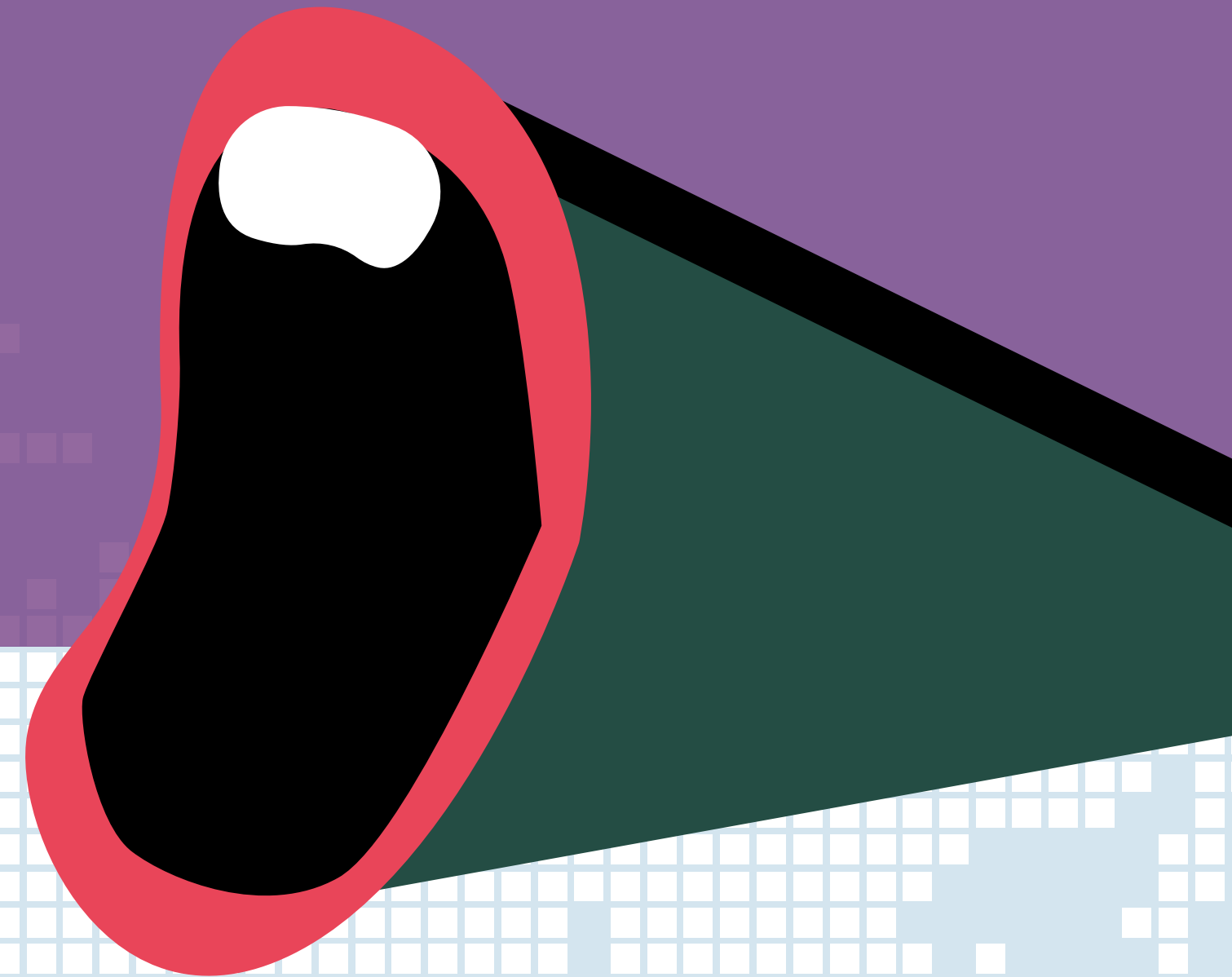


QUESTION: What is your company's primary business model?
Base: N = 805

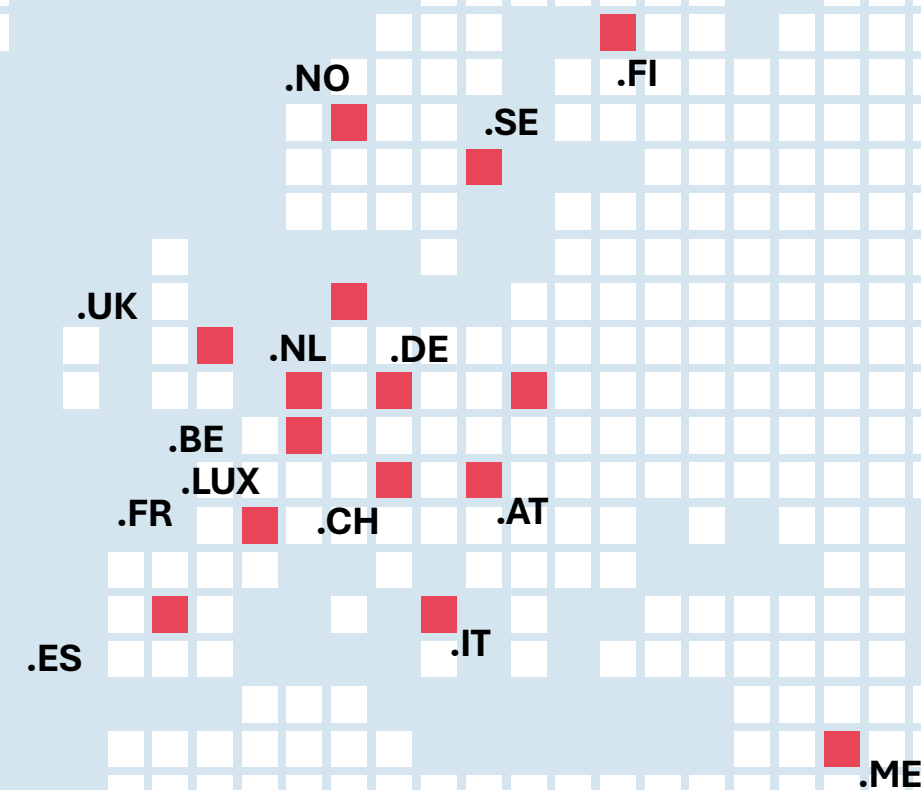


QUESTION: Please indicate how many employees work in your company.
Base: N = 805

Broad perspective: participants from 15 markets on 2 continents



BeLux



United Kingdom

Austria

Germany

Italy

Spain

Switzerland

Nordics*

France

Middle East

Netherlands

*Nordics= Denmark, Sweden, Norway, Finland

8 questions regarding trends, challenges and skills in Marketing 2026



How do you think the economic situation in your sector will develop in 2026?

1

How will your marketing budget for 2026 develop?

2

In your opinion, what is the hot topic for the marketing year of 2026?

3

How important do you think the following marketing trends will be in 2026?

4

What's your superpower? Which capabilities and skills does a CMO need to have these days to make their organisation fit for the future?

5

Which specialist skills should a successful marketing team have?

6

What kind of inspiration do you expect from your agency partners in the future?

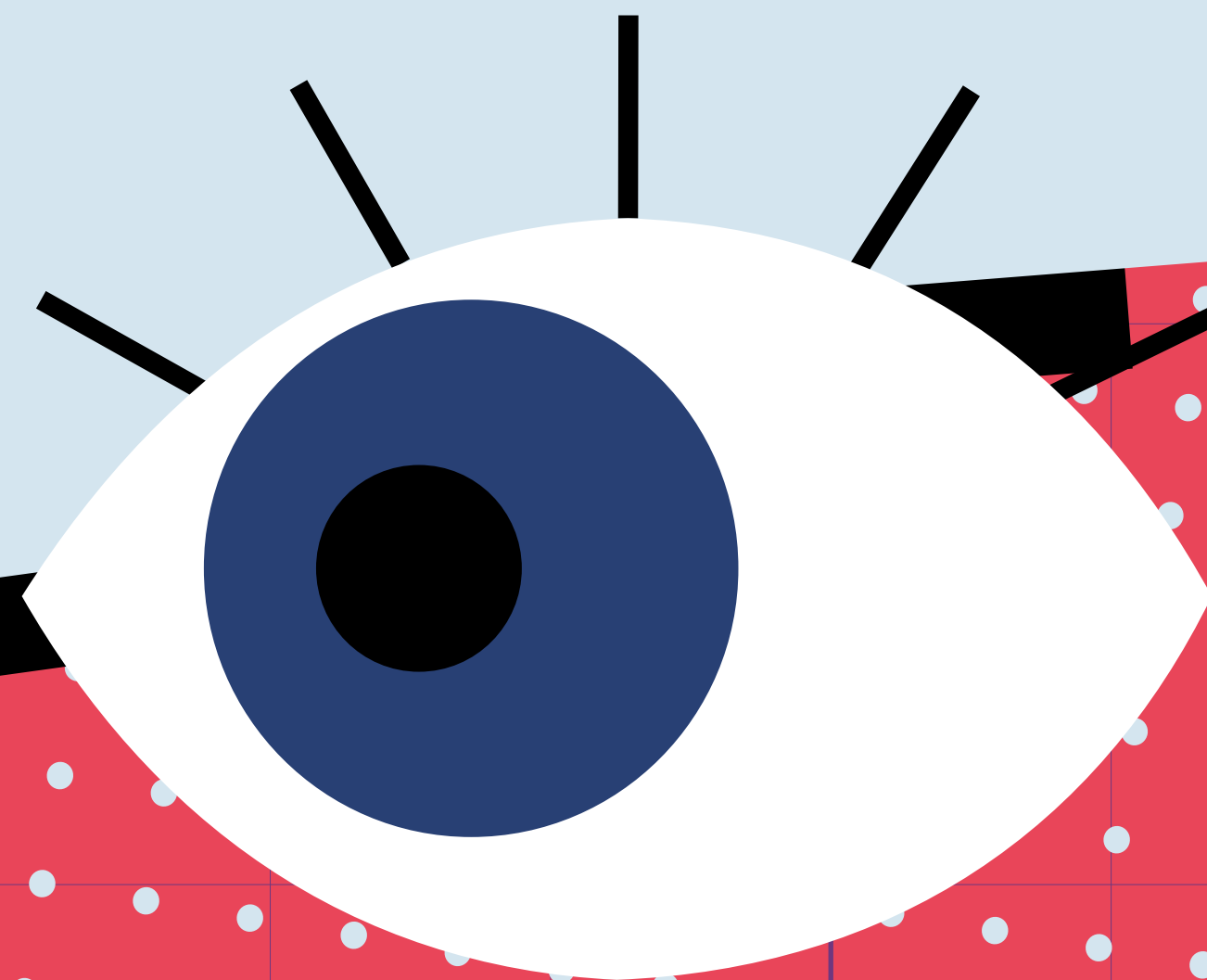
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Which three sources of information have been most valuable to your professional work in the last 6 months?

8

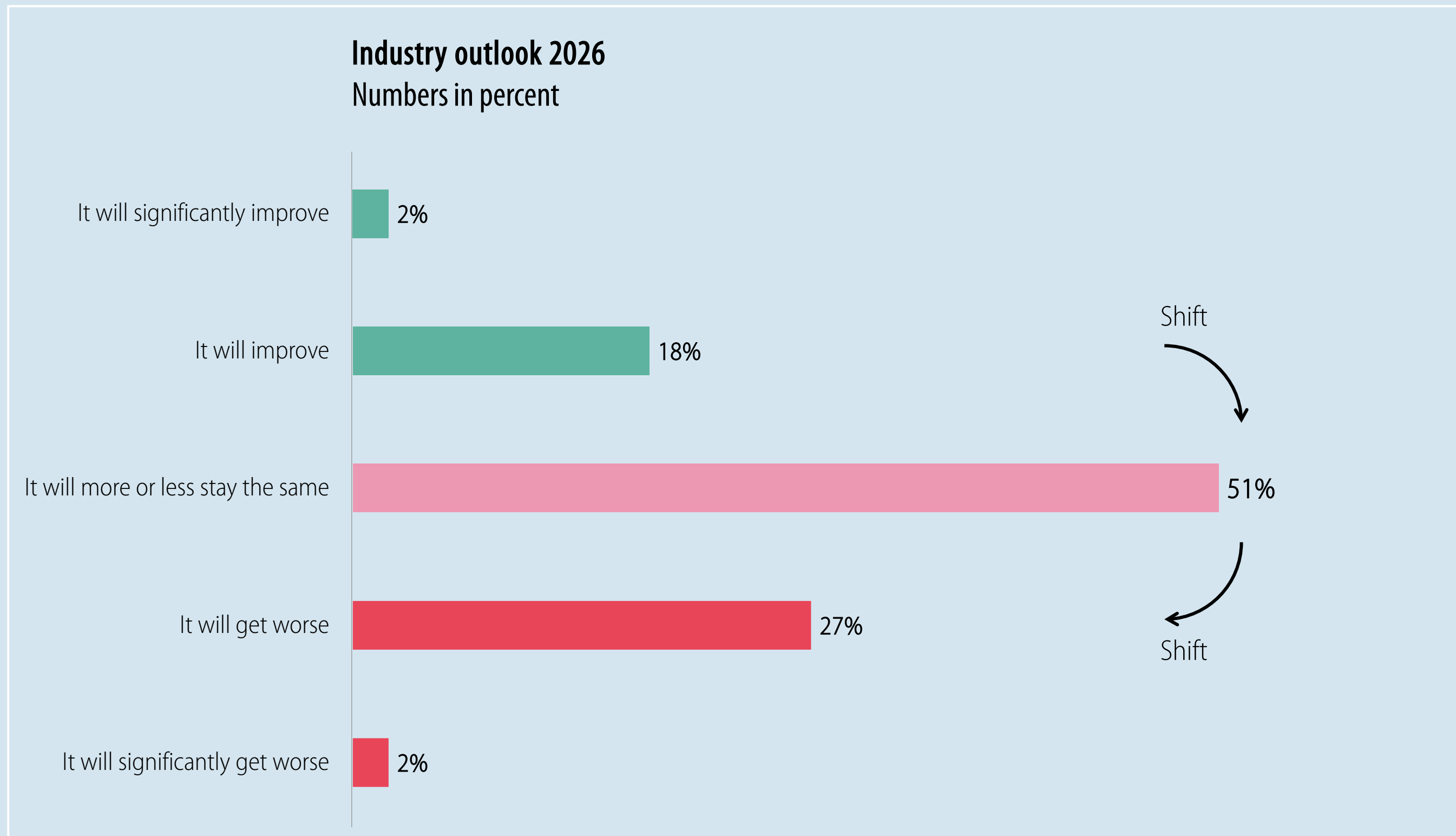
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How do you think the economic situation
in your sector will develop in 2026?

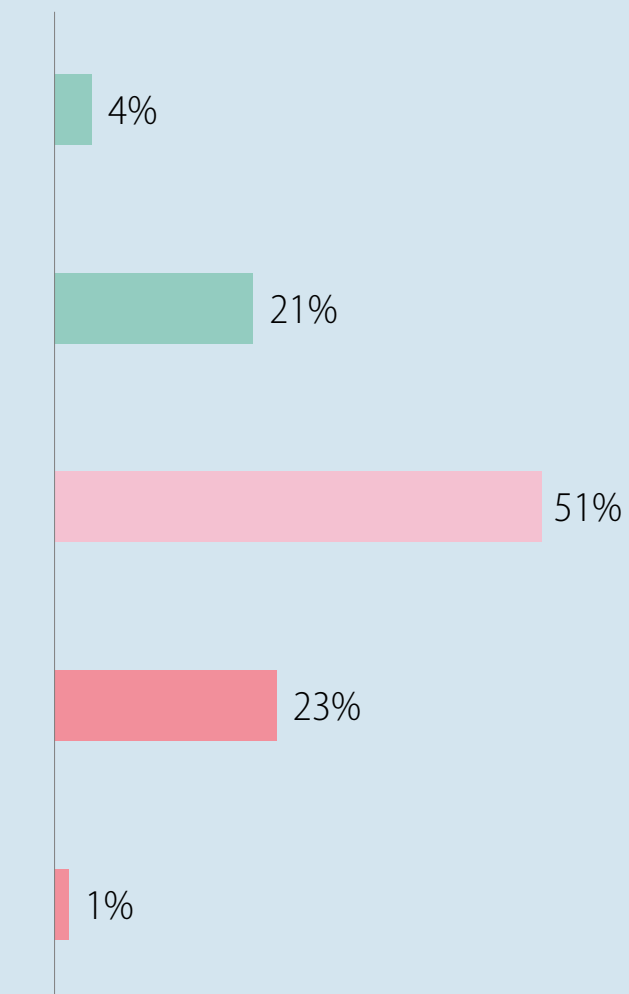


OPTIMISM? OVER & OUT.

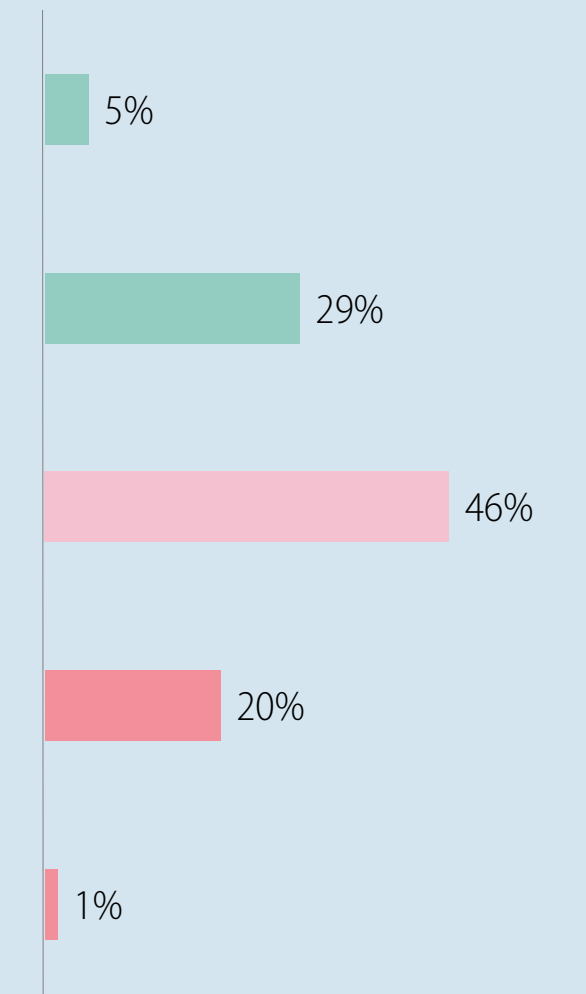
More and more CMOs are worried about the economic situation – still most expect stagnation.



Industry outlook 2025
Numbers in percent



Industry outlook 2024
Numbers in percent



Question: How do you think the economic situation in your industry will develop in 2026? Base: N = 805

STUCK IN THE MIDDLE: CAUTION RULES

Everywhere, bold forecasts remain rare. Most CMOs see steady conditions ahead, led by Spain’s two-thirds majority. Only the Middle East stands out: Optimism is surging, one in two CMOs is expecting improvement.

Industry outlook 2026 (sorted by country)

Numbers in percent

	DE (n= 192)	AT (n= 28)	CH (n=153)	BELUX (n= 42)	NE (n =107)	ES (n=38)	FR (n=32)	IT (n=91)	UK (n= 47)	ME (n=56)	NORD (n=19*)	Overall (n=805)
Top 2	17%	17%	10%	12%	21%	11%	16%	25%	23%	52%	26%	20%
It will significantly improve	1%	0%	1%	0%	5%	0%	0%	1%	0%	14%	0%	2%
It will improve	16%	17%	10%	12%	17%	11%	16%	24%	23%	38%	26%	18%
It will more or less stay the same	58%	56%	54%	52%	51%	66%	53%	41%	43%	32%	42%	51%
It will get worse	22%	22%	33%	36%	25%	21%	31%	33%	34%	14%	32%	27%
It will significantly get worse	3%	6%	3%	0%	2%	3%	0%	1%	0%	2%	0%	2%
Bottom 2	25%	28%	36%	36%	27%	24%	31%	34%	34%	16%	32%	29%

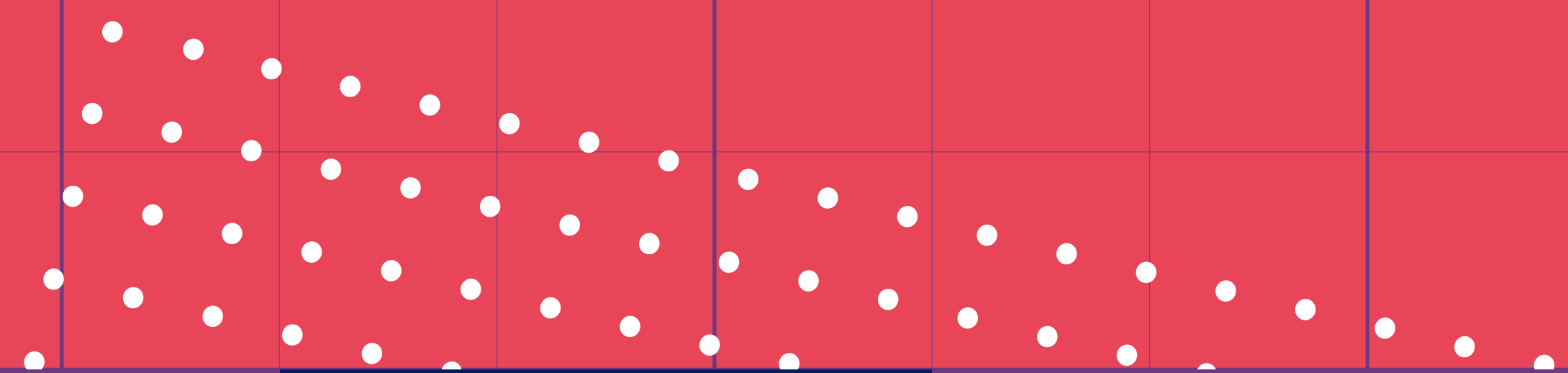
Question: How do you think the economic situation in your industry will develop in 2026? Base: N = 805

*Evaluation is not representative due to the small number of responses.



How do you think the economic situation in your sector will develop in 2026?

CENTRAL FINDINGS ACROSS MARKETS



The majority of CMOs assume that the situation will remain more or less unchanged, esp. in ES (66%), DE, AT, CH, BELUX, NE, and FR.

Every second CMO in the Middle East believes in an improved economic situation.

Nearly one-third of CMOs believe the situation will worsen, with Switzerland and BELUX being the most pessimistic.

Following the Middle East, Italy, the UK, and the Nordics stand out as both the most optimistic and, at the same time, the most polarized — since they also include some of the most pessimistic respondents.

Almost no one believes that the economic situation will improve significantly, except the Middle East (14%) and the Netherlands (5%).

Very few CMOs believe that there will be a significant deterioration, with Austria having the highest percentage (6%).

The assessment in the DACH region is very similar, with only Switzerland being more pessimistic.

Same economy, different stories

The economic mood is steady on the surface. But beneath it, pessimism runs deeper than optimism – with automotive leading the downturn as more than half expect things to get worse.

Industry outlook 2026 (sorted by sector)

Numbers in percent

	Automobile industry N=23	Banking & insurances N=59	Construction & building materials N=29	Services N=99	Energy N=16*	Retail N=78	IT & telecommunications N=47	Consumer goods & food products N=192	Media N=52	Pharmaceutical / health N=34	Other N=170	Total N=805
Top 2	22%	24%	17%	19%	38%	17%	36%	17%	8%	9%	23%	20%
It will significantly improve	4%	0%	0%	2%	0%	0%	11%	1%	0%	0%	5%	2%
It will improve	17%	24%	17%	17%	38%	17%	26%	16%	8%	9%	18%	18%
It will more or less stay the same	26%	54%	69%	45%	38%	58%	40%	50%	54%	68%	52%	51%
It will get worse	39%	20%	14%	33%	25%	23%	19%	32%	37%	24%	23%	27%
It will significantly get worse	13%	2%	0%	2%	0%	3%	4%	1%	2%	0%	2%	2%
Bottom 2	52%	22%	14%	35%	25%	26%	23%	33%	38%	24%	25%	29%

Question: How do you think the economic situation in your industry will develop in 2026? Base: N = 805

*Evaluation is not representative due to the small number of responses.



How do you think the economic situation in your sector will develop in 2026?

CENTRAL FINDINGS ACROSS SECTORS

CMOs anticipate that the situation will remain unchanged, particularly within the construction and healthcare sectors.

CMOs remain most optimistic about the energy and IT and telecommunications industries.

In the IT and telecommunications sector, more than one in ten CMOs believe that the economic situation will improve significantly.

The automotive industry is the most pessimistic. Half of all (CMOs) believe that the situation will worsen.

CMOs from the automotive sector are the most pessimistic, followed by services, consumer goods & food products, and media.



What stands out for me in this year's CMO Barometer is that marketing leaders are BEING PULLED IN TWO DIRECTIONS AT ONCE: managing economic uncertainty while redesigning how their organisations operate. AI may dominate the headlines, but the real story is how deeply it is RESHAPING CAPABILITIES, TEAM STRUCTURES, AND DECISION-MAKING MODELS.



RICHARD SUMNER

Regional Managing Partner, Consumer Markets
Practice, Europe & Africa
Heidrick & Struggles

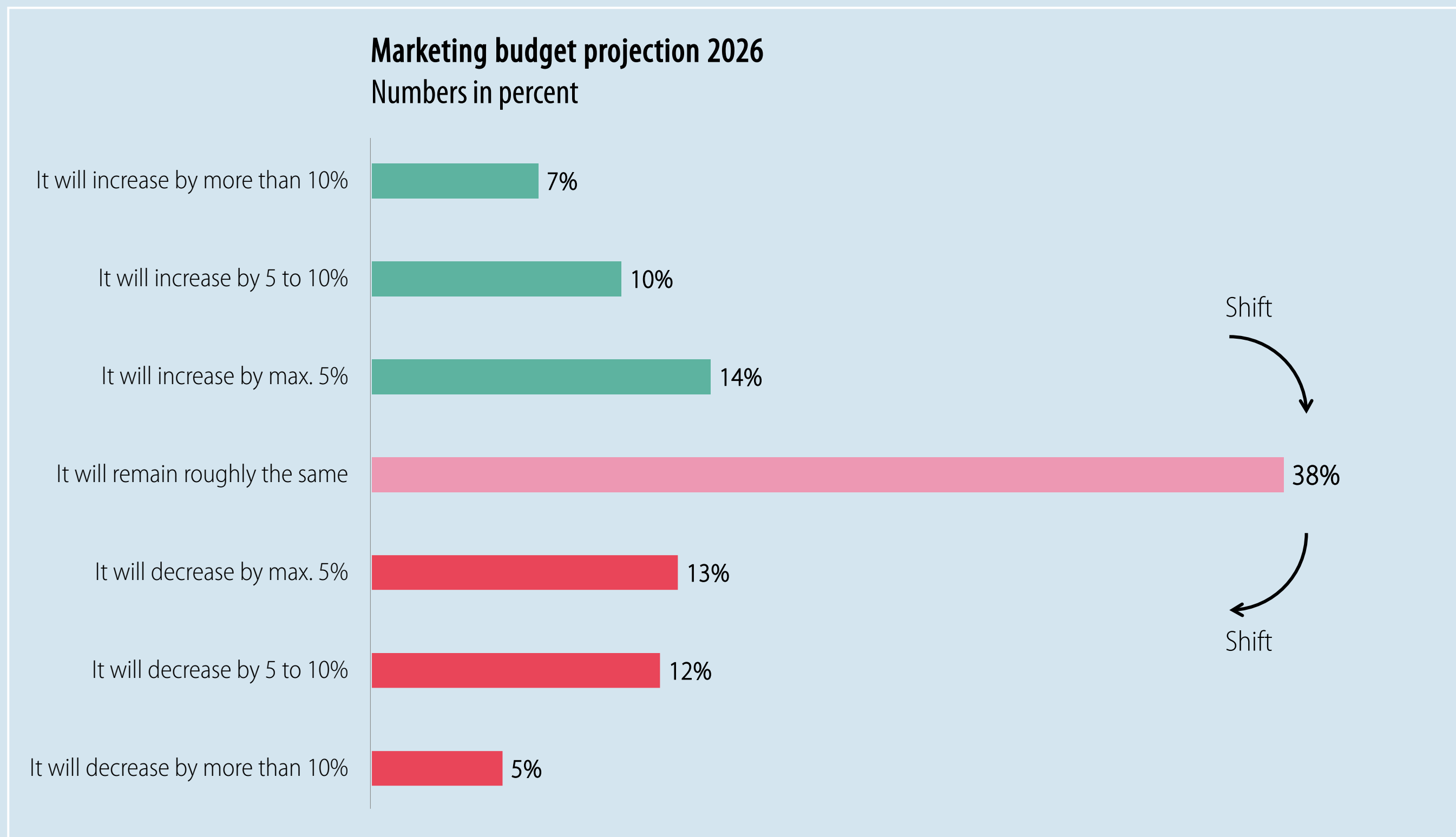
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How will your marketing budget
for 2026 develop?

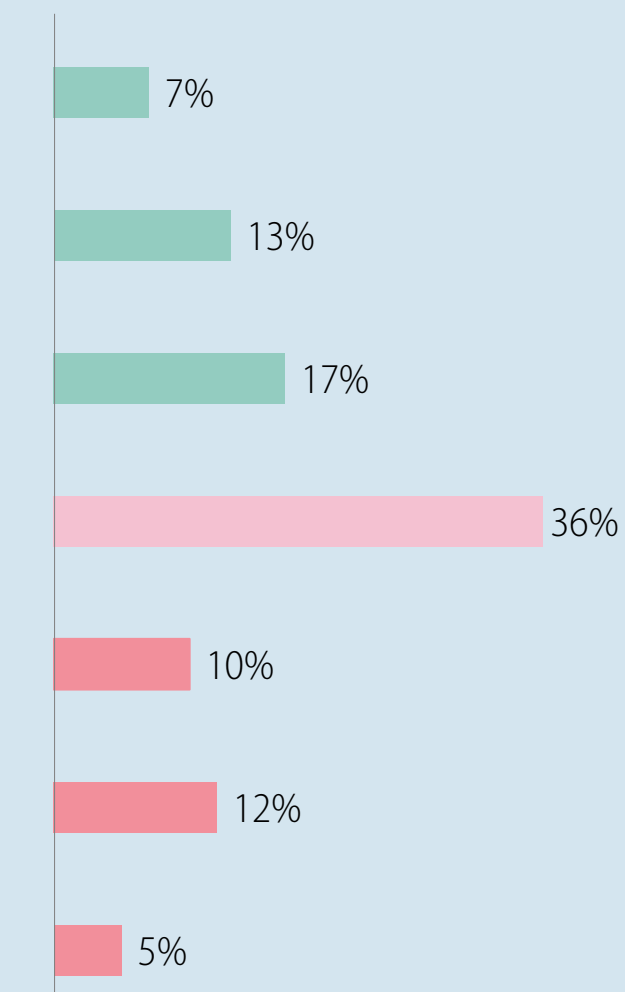


IN DOUBT WE TRUST?

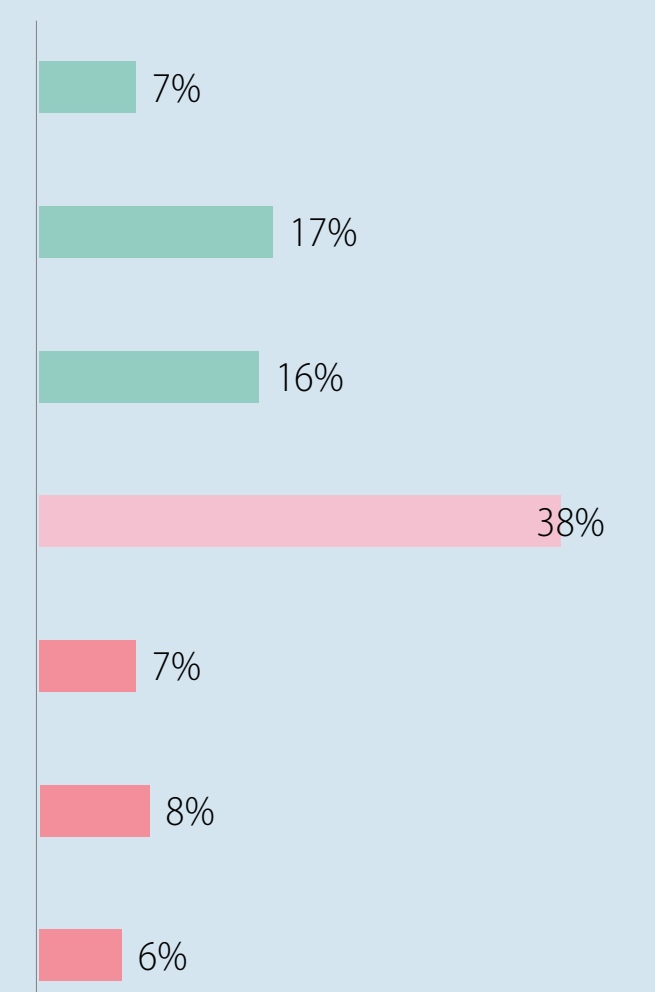
CMOs are split, but the mood is shifting: Fewer believe in growth, and more expect marketing budgets to decline – mirroring the broader economic downturn.



Marketing budget projection 2025
Numbers in percent



Marketing budget projection 2024
Numbers in percent



Question: How will your marketing budget for 2026 (marketing investments and expenditure) develop? Base: N = 805

OPTIMISM DEPENDS ON GEOGRAPHY

Mood by map: CMO sentiment varies widely by country. In the Netherlands, Italy, the UK and the Middle East, the outlook is far brighter than in Austria.

Marketing budget projection 2026 (sorted by country)
Numbers in percent

	DE (n= 192)	AT (n= 28)	CH (n=153)	BELUX (n= 42)	NE (n =107)	ES (n=38)	FR (n= 32)	IT (n=91)	UK (n= 47)	ME (n=56)	NORD (n=19*)	Overall (n=805)
Top 3	30%	17%	22%	24%	41%	16%	19%	45%	43%	43%	32%	32%
It will increase by more than 10%	7%	0%	3%	5%	7%	0%	3%	8%	17%	20%	11%	7%
It will increase by 5 to 10%	10%	6%	7%	0%	21%	3%	6%	18%	11%	11%	5%	10%
It will increase by max. 5%	13%	11%	12%	19%	14%	13%	9%	20%	15%	13%	16%	14%
It will remain roughly the same	39%	33%	46%	38%	37%	55%	53%	23%	28%	30%	32%	38%
It will decrease by max. 5%	13%	17%	14%	21%	11%	11%	13%	14%	11%	2%	26%	13%
It will decrease by 5 to 10%	12%	28%	10%	12%	8%	13%	9%	14%	17%	14%	11%	12%
It will decrease by more than 10%	6%	6%	8%	5%	2%	5%	6%	3%	2%	11%	0%	5%
Bottom 3	31%	50%	32%	38%	21%	29%	28%	32%	30%	27%	37%	30%

Question: How will your marketing budget for 2026 (marketing investments and expenditure) develop? Base: N = 805

*Evaluation is not representative due to the small number of responses.



How will your marketing budget
for 2026 develop?

CENTRAL FINDINGS ACROSS MARKETS

Italy is the most positive
(45%), closely followed by
the UK, the Middle East,
and the Netherlands.

In Middle East, one in five
CMOs believes that the
marketing budget will increase
by more than 10%. The UK also
plays a special role (17%).

Approximately half of all CMOs
in Spain (highest value at
55%), France and Switzerland
believe that marketing budgets
will remain unchanged.

The most pessimistic
CMOs come from Austria:
According to every second
CMO, the marketing budget
will decrease.

CMOs in Germany, BELUX and
Nordics are nearly split in
the middle – only in BELUX,
optimists are slightly less
numerous.

Dutch CMOs are not
only among the most
optimistic, but also the
least pessimistic (21%).

Budgets tell a different story

CMOs hold contrasting views on how marketing budgets are evolving – not only across industries, but also compared to their economic outlook. However, the automotive sector remains the most pessimistic.

Marketing budget projection 2026 (sorted by sector)

Numbers in percent

	Automobile industry N=23	Banking & insurances N=59	Construction & building materials N=29	Services N=99	Energy N=16*	Retail N=78	IT & telecommunications N=47	Consumer goods & food products N=192	Media N=52	Pharmaceutical / health N=34	Other N=170	Total N=805
Top 3	22%	42%	28%	27%	38%	27%	43%	33%	31%	18%	32%	32%
It will increase by more than 10%	4%	14%	3%	4%	31%	4%	13%	4%	4%	3%	10%	7%
It will increase by 5 to 10%	13%	14%	14%	10%	6%	8%	15%	8%	12%	9%	11%	10%
It will increase by max. 5%	4%	15%	10%	13%	0%	15%	15%	21%	15%	6%	10%	14%
It will remain roughly the same	30%	32%	52%	45%	19%	41%	36%	33%	37%	65%	37%	38%
It will decrease by max. 5%	13%	10%	7%	9%	13%	13%	11%	17%	19%	9%	12%	13%
It will decrease by 5 to 10%	4%	12%	14%	15%	25%	13%	9%	11%	13%	9%	11%	12%
It will decrease by more than 10%	30%	3%	0%	3%	6%	6%	2%	6%	0%	0%	8%	5%
Bottom 3	48%	25%	21%	27%	44%	32%	21%	34%	33%	18%	31%	30%

Question: How will your marketing budget for 2026 (marketing investments and expenditure) develop? Base: N = 805

*Evaluation is not representative due to the small number of responses.



How will your marketing budget
for 2026 develop?

CENTRAL FINDINGS ACROSS SECTORS

When it comes to marketing budgets, banking & insurance and IT & telecommunications are the most optimistic.

The range at Energy sector is enormous: its CMOs are among the most optimistic and the most pessimistic.

Almost one in three CMOs in the energy sector believes that their marketing budget will increase by more than 10%.

CMOs across consumer goods & food products, media or others are still sitting on the fence: One third see improvement, one third expect decline, and one third see no change.

Pharma and health stay calm: 65% expect no change, few see ups or downs.

The automotive industry is the most pessimistic. One in three CMOs believes that the budget will decrease by more than 10%.

In your opinion, what is the hot
topic of the marketing year 2026?

3

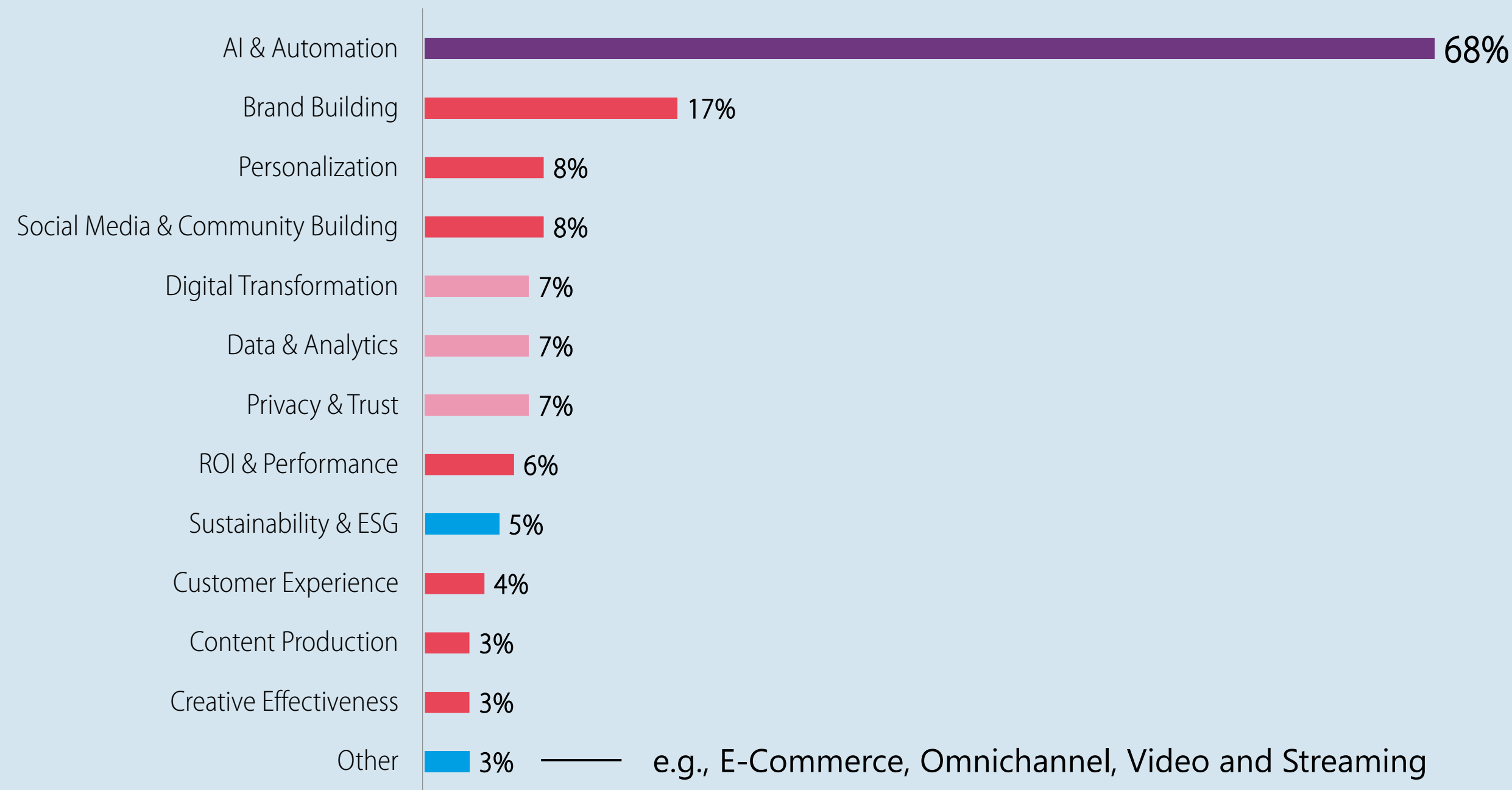


AI REWRITES THE RULES OF MARKETING

Most CMOs name more than one topic, indicating that AI must be fully integrated into all marketing tasks by 2026 – especially for Automation, but also for Brand Building.

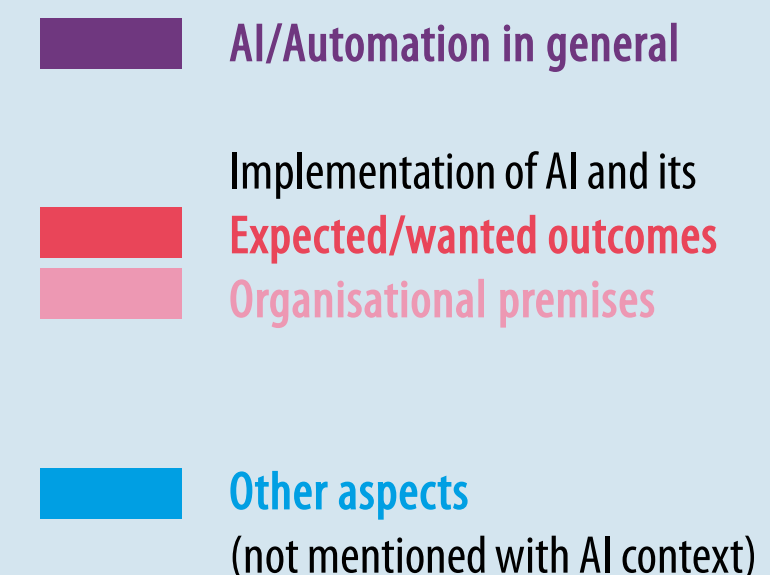
Hot Topic in Marketing 2026

Derived topic clusters, numbers in percent, multiple mentions possible



Usage of Gen AI and Agentic Services for improvements on Efficiency and Productivity

AI challenges the marketing organizations: from silos to a new operating model in which end-to-end responsibility lies from strategy to performance, from experience to privacy to ROI.



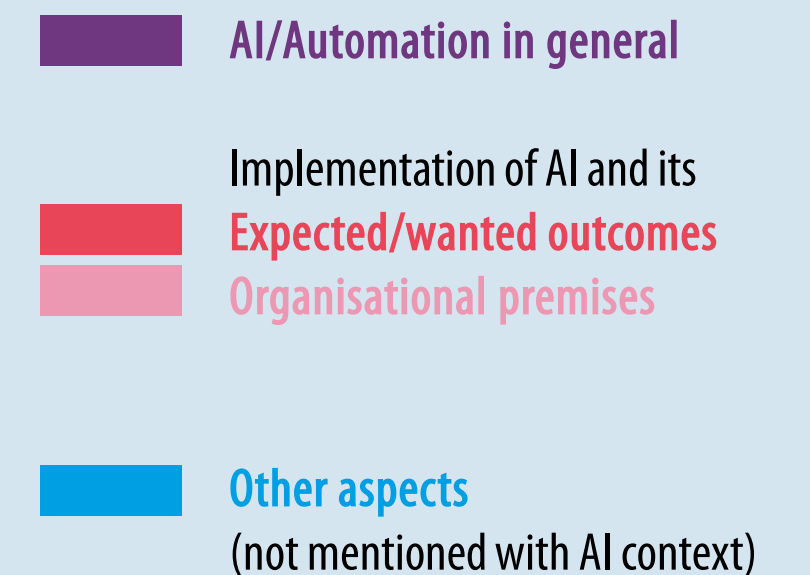
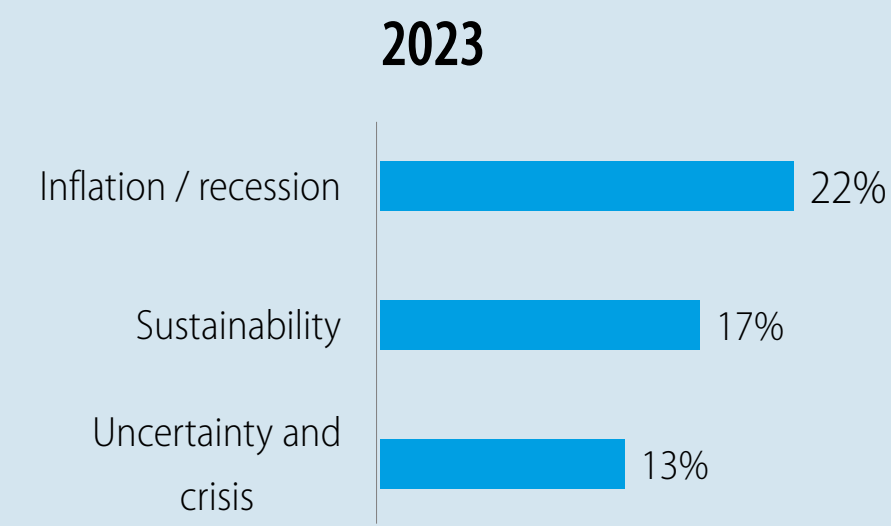
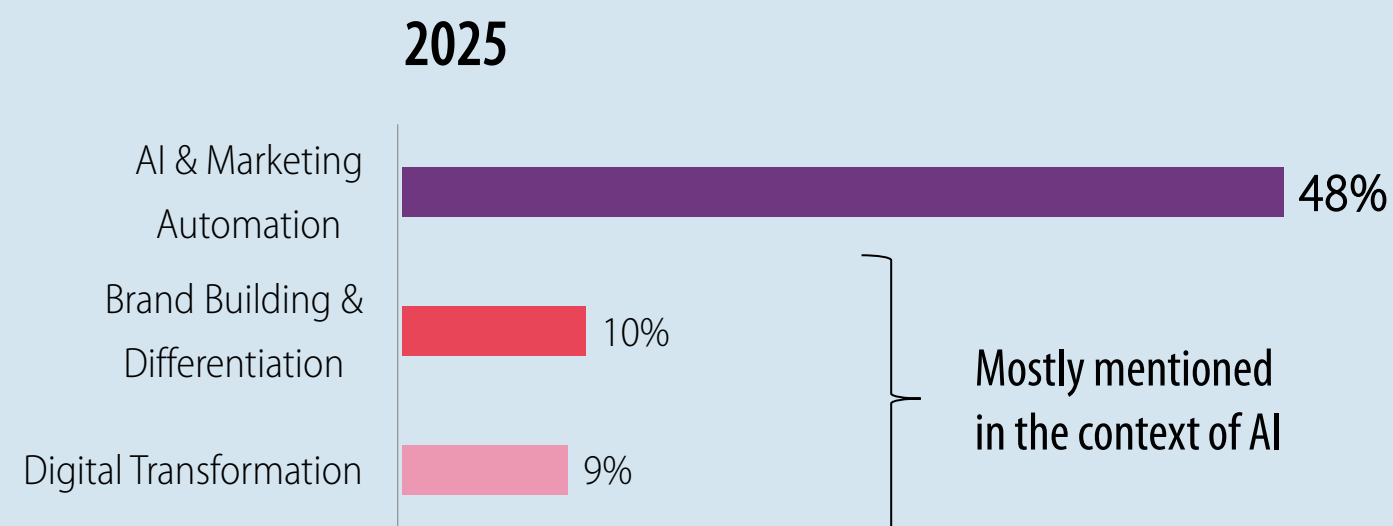
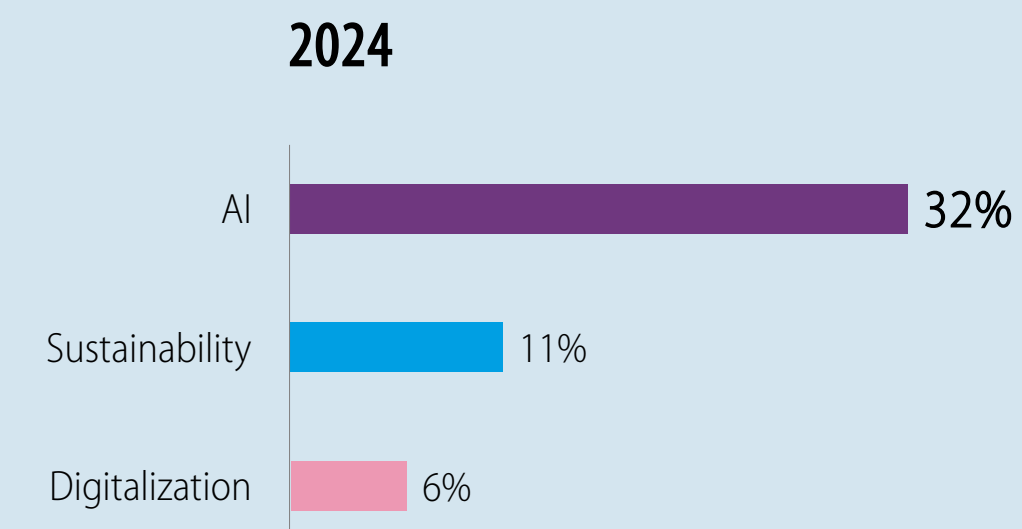
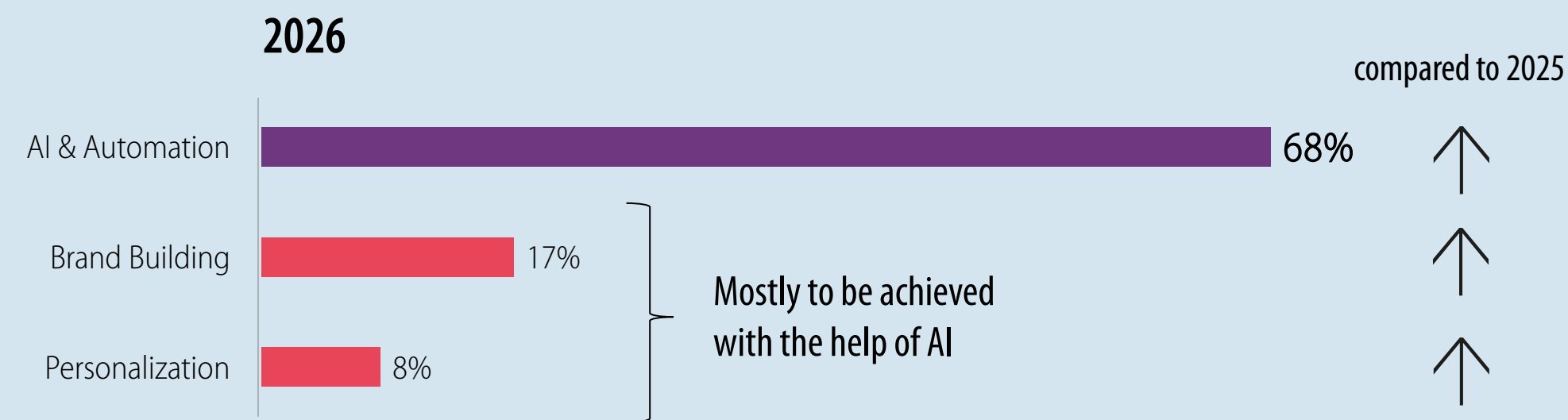
Question: In your opinion, what is the hot topic for the marketing year of 2026? Base: N = 805

SYSTEM UPDATE REQUIRED.

More than just a trend, AI is redefining the industry's focus – pushing softer topics to the sidelines and reshaping priorities like no trend before.

Hot Topic in Marketing 2026

Derived topic clusters, numbers in percent, multiple mentions possible



Question: In your opinion, what is the hot topic for the marketing year of 2026? Base: N = 805



THE HOT TOPIC IN MARKETING IN 2026 is the company's AI footprint. It's about how organisations will be using generative AI models, how they are using Predictive analytics and **WILL BE ABLE TO IMPLEMENT DATA-DRIVEN DECISION-MAKING.**



JAQUELINE CASINI
SVP-Marketing & Corporate Communications,
Rolls-Royce Power Systems AG

4

How important do you think the following marketing trends will be in 2026?

AI PUSHES THE PACE

What matters, matters even more: Marketing's next chapter is driven by AI – and with it, efficiency, effectiveness, and data. Despite the impact focus, emotional brand building still makes the Top 5.

Marketing trends 2026

Numbers in percent

xf

TOP 5 2026		Top2 (very important + important)	compared to 2025
1	Use of AI in marketing processes	87%	↑
2	Customer experience, personalization and improvement of the customer journey	83%	↗
3	Data-based marketing	80%	↑
4	Marketing ROI / marketing controlling / marketing analytics	78%	↗
5	Emotional brand building	77%	↗

TOP 5 2025		Top2
1	Use of artificial intelligence (AI) in marketing processes	81%
2	Customer journey management & personalization	80%
3	Content creation & optimisation, content marketing	78%
4	Marketing ROI / marketing controlling / marketing analytics	76%
5	Emotional brand building	74%

TOP 5 2024		Top2
1	Artificial Intelligence, Machine Learning & Marketing Automation	83%
2	Content Creation	82%
3	Emotional Branding	82%
4	Sustainability	78%
5	Omnichannel Marketing	77%

Question: In your opinion, what is the hot topic for the marketing year of 2026? Base: N = 805

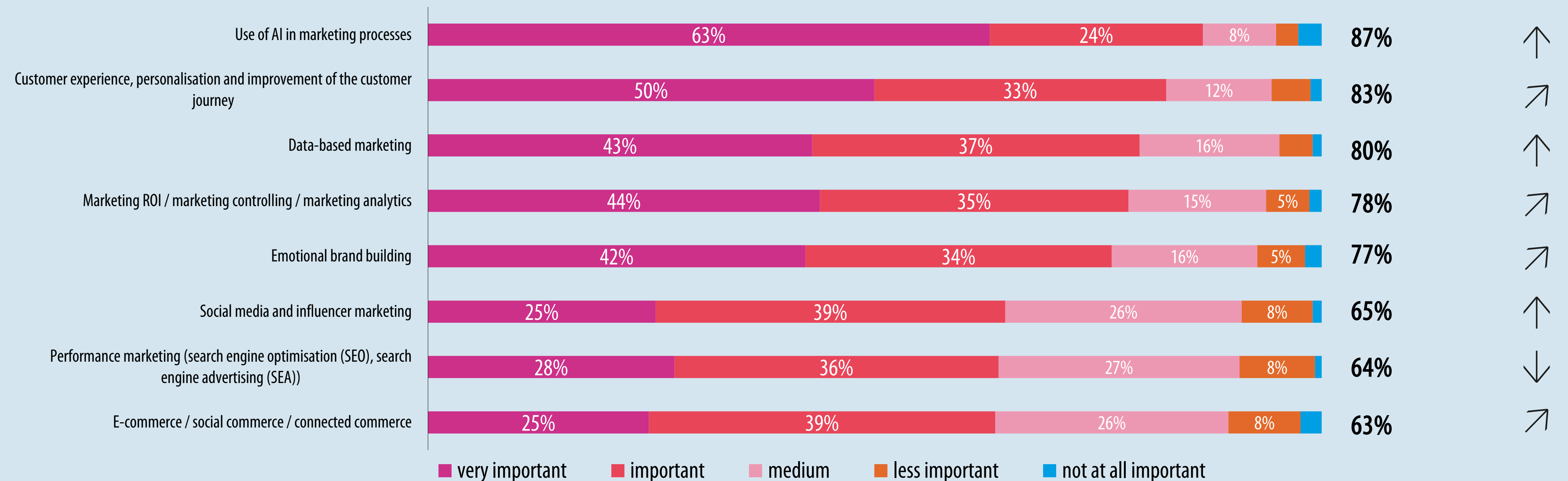
NAIL THE BASICS. PROVE THE IMPACT.

No excuses: Marketing must deliver results – the more effective and efficient, the better. And success depends on implementing AI the right way.

Marketing trends 2026

Numbers in percent (Values below 5% not labeled)

TOP 2 2026
(very important + important) compared
to 2025



Question: In your opinion, what is the hot topic for the marketing year of 2026? Base: N = 805

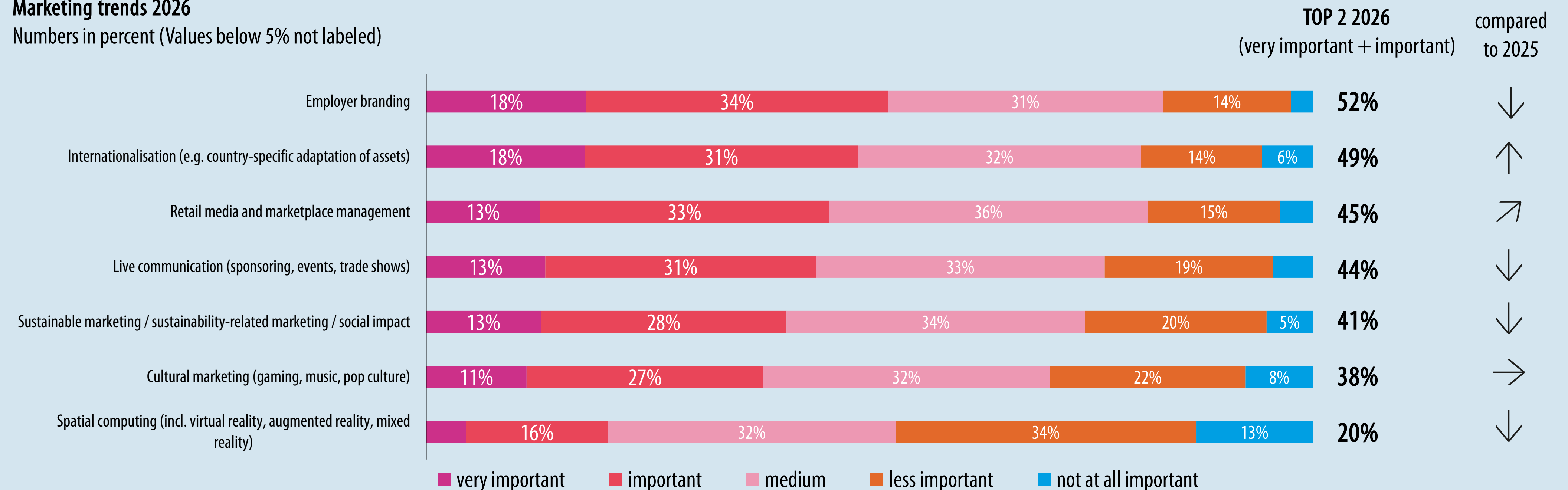
TOP 2: Summary of categories 1 - Very Important and 2 - Somewhat Important.

BASICS BEFORE BUZZ.

Specific topics remain specific – the basics need to be done first. Once those are covered, CMOs can focus on the extras and niche themes, with sustainability now among them.

Marketing trends 2026

Numbers in percent (Values below 5% not labeled)



Question: In your opinion, what is the hot topic for the marketing year of 2026? Base: N = 805

TOP 2: Summary of categories 1 - Very Important and 2 - Somewhat Important.

AI EVERYWHERE?

AI dominates across most markets or ranks among the top two priorities. The UK stands out for a different reason – AI seems to be already business as usual.

Marketing trends 2026: Highest ranks sorted by the top 2 values (very important + important)

Numbers in percent (Values below 5% not labeled)

	DE (n= 192)	AT (n= 28)	CH (n=153)	BELUX (n= 42)	NE (n =107)	ES (n=38)	FR (n= 32)	IT (n=91)	UK (n= 47)	ME (n=56)	NORD (n=19*)	Overall (n=805)
Use of AI in marketing processes	91%	94%	84%	81%	91%	87%	84%	77%	85%	93%	89%	87%
Customer experience, personalization and improvement of the customer journey	84%	78%	86%	76%	82%	71%	88%	75%	87%	89%	89%	83%
Data-based marketing	82%	89%	80%	81%	77%	76%	84%	69%	79%	89%	79%	80%
Marketing ROI / marketing controlling / marketing analytics	83%	72%	70%	81%	79%	76%	72%	74%	89%	91%	74%	78%
Emotional brand building	86%	94%	70%	74%	70%	76%	81%	68%	79%	79%	74%	77%
Social media and influencer marketing	73%	83%	54%	52%	66%	61%	72%	49%	70%	77%	79%	65%
Performance marketing (search engine optimisation (SEO), search engine advertising (SEA))	59%	83%	67%	57%	64%	63%	69%	58%	66%	71%	74%	64%
E-commerce / social commerce / connected commerce	66%	83%	61%	64%	61%	63%	59%	49%	57%	86%	74%	63%

Question: In your opinion, what is the hot topic for the marketing year of 2026? Base: N = 805

*Evaluation is not representative due to the small number of responses.

=Highest Top 2 value
 =Second highest Top 2 value

NEARLY UNITED IN THE NICHE

Spatial computing? Not a top priority – the only point of agreement. Beyond that, views on specific topics split: e.g. sustainability ranks higher in the Netherlands, and cultural marketing gains attention in the Middle East.

Marketing trends 2026: Highest ranks sorted by the top 2 values (very important + important)

Numbers in percent (Values below 5% not labeled)

	DE (n= 192)	AT (n= 28)	CH (n=153)	BELUX (n= 42)	NE (n =107)	ES (n=38)	FR (n= 32)	IT (n=91)	UK (n= 47)	ME (n=56)	NORD (n=19*)	Overall (n=805)
Employer branding	53%	61%	54%	36%	59%	39%	56%	55%	38%	59%	32%	52%
Internationalisation (e.g. country-specific adaptation of assets)	50%	39%	39%	50%	57%	50%	53%	40%	62%	63%	37%	49%
Retail media and marketplace management	49%	33%	33%	50%	50%	55%	50%	49%	34%	55%	42%	45%
Live communication (sponsoring, events, trade shows)	46%	56%	44%	29%	52%	39%	31%	46%	38%	48%	21%	44%
Sustainable marketing / sustainability-related marketing / social impact	27%	44%	35%	43%	61%	53%	50%	47%	34%	45%	37%	41%
Cultural marketing (gaming, music, pop culture)	43%	33%	24%	33%	38%	34%	31%	41%	45%	57%	42%	38%
Spatial computing (incl. virtual reality, augmented reality, mixed reality)	15%	17%	20%	17%	28%	45%	19%	18%	11%	30%	16%	20%

Question: In your opinion, what is the hot topic for the marketing year of 2026? Base: N = 805

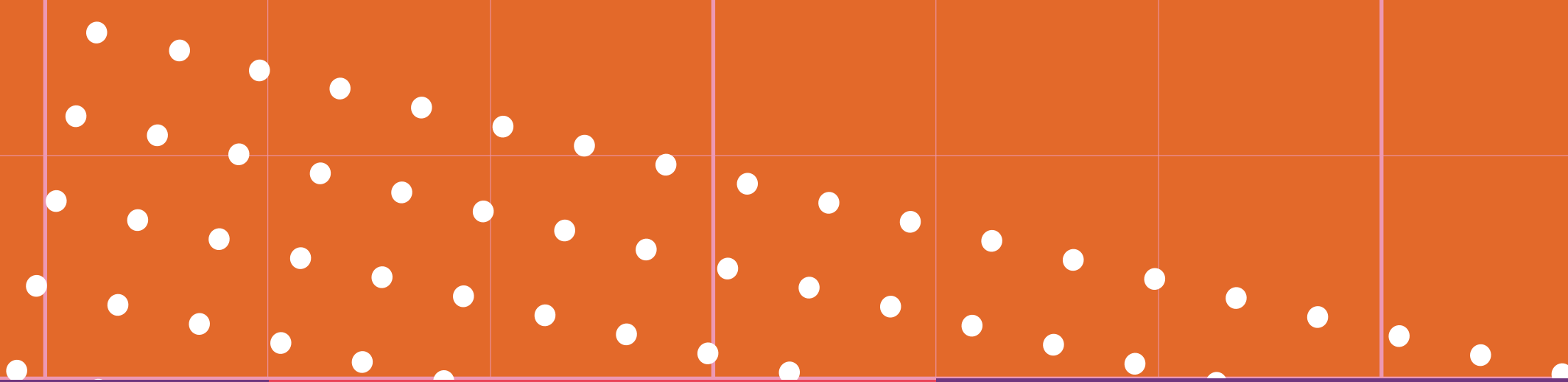
*Evaluation is not representative due to the small number of responses.

=Lowest Top 2 value
 =Second lowest Top 2 value



How important do you think the following marketing trends will be in 2026?

CENTRAL FINDINGS ACROSS MARKETS



Italy's figures are comparatively low: E.g. a first-place response of 77% would not even place in the top three in many other countries.

Of all the countries, Switzerland, France and the UK were the only ones where AI was not the most frequently mentioned topic.

In Austria, emotional brand building is as important as the use of AI in marketing processes (94%).

The Middle East plays a special role in cultural marketing: more than half of all CMOs (57%) consider the topic to be relevant.

The topic of sustainability is shrouded in uncertainty: in the Netherlands, 61% consider it to be important or very important, compared to 27% in Germany.

Internationalization is most important to CMOs in Middle East (63%) and UK (62%).

In Austria (56%) and the Netherlands (52%), half of all CMOs consider live communication to be important or very important.

Spanish CMOs rate spatial computing higher than those in any other country: Almost half of them consider it relevant.



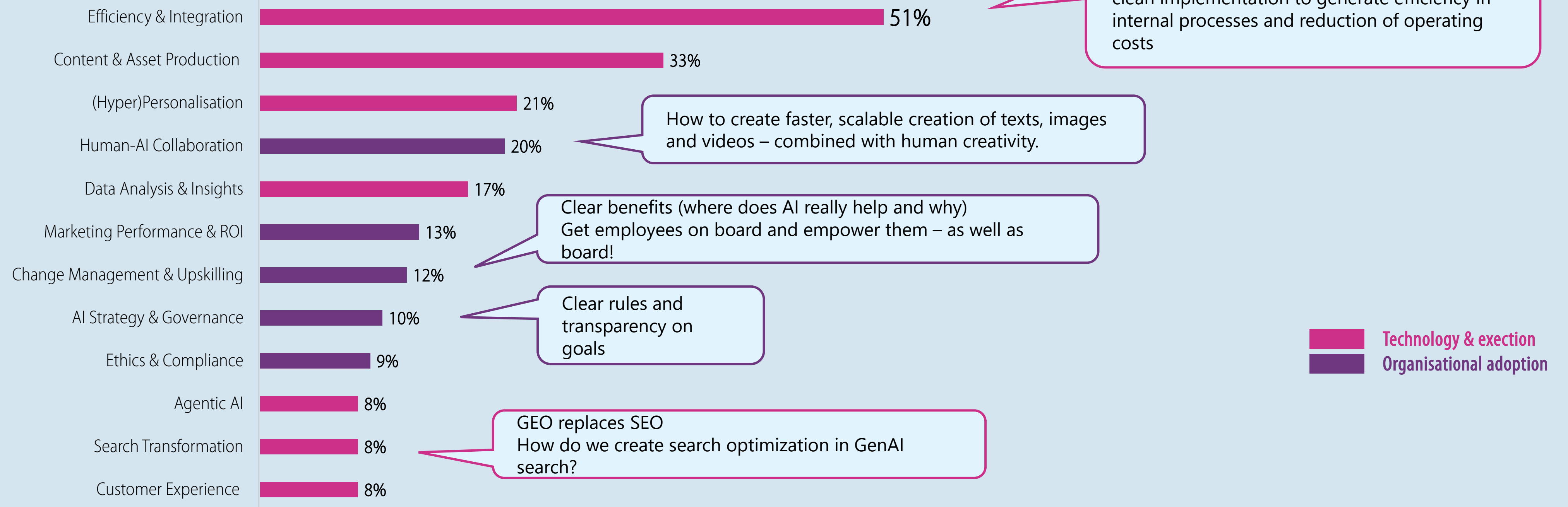
4a

Which aspect of AI / the integration of AI
will be particularly important and why?

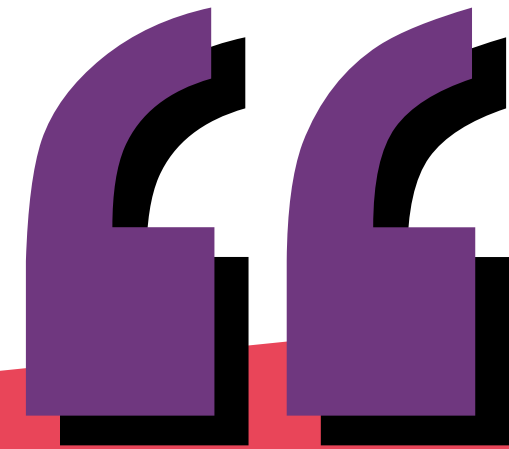
BALANCING CODING AND CARING

CMOs must now deliver on the promise of AI and, to do so, must master both the technical systems and the human needs of customers and colleagues.

Important aspects of AI Numbers in percent



Question: Which aspect of AI / the integration of AI will be particularly important and why? Base: N = 700 (AI is considered "very important" or "important")



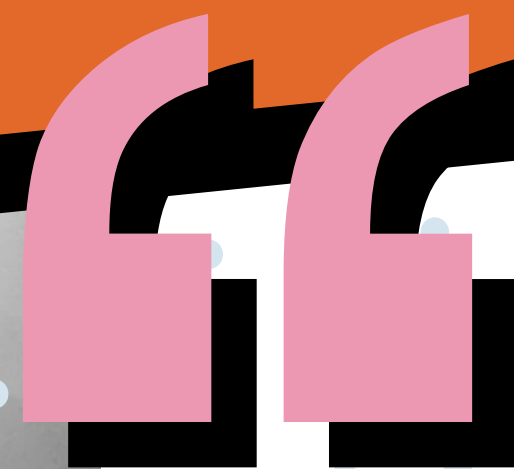
The make-or-break factor is embedding AI into everyday workflows, inside the tools marketers already use (CRM, analytics, campaign ops). **ADOPTION IS A LEADERSHIP JOB:** pick 2–3 concrete use cases, train to competence, and track hard metrics (e.g. tests per week). When AI is ‘in the flow,’ it increases speed and decision quality, faster customer learning, sharper targeting/creative, smarter budget allocation. Teams that normalise daily use and hold leaders accountable for usage and outcomes will see durable gains; everyone else will dabble.

MARC-ANDRE HADE

Chief Commercial & Marketing Officer,
spabreaks.com



Whilst much of the 2026 conversation and buzz will focus on AI, the real imperative for marketers will be to return to the fundamentals of creating value through their brands and categories. **IN AN INFLATION-DRIVEN, LOW-DIFFERENTIATION MARKET, THE GREATEST OPPORTUNITY LIES IN DEMAND CREATION THROUGH CATEGORY REFRAMING – ESPECIALLY FOR CATEGORY LEADERS.** Rather than chasing incremental features or short-term tactics with diminishing returns, these brands will redefine what their category truly means by addressing the core needs it fulfills and telling a compelling story of why it exists. Crucially, this approach also future-proofs categories against the value destruction of an inflationary environment, where price wars can trigger a downward spiral of eroding margins, shrinking brand investment, and stifled innovation. By elevating the category's meaning and reinforcing its essential value, marketers can protect long-term growth while sustaining consumer relevance.



GUILHERME FERREIRA
Global Brand Vice President,
Cadbury

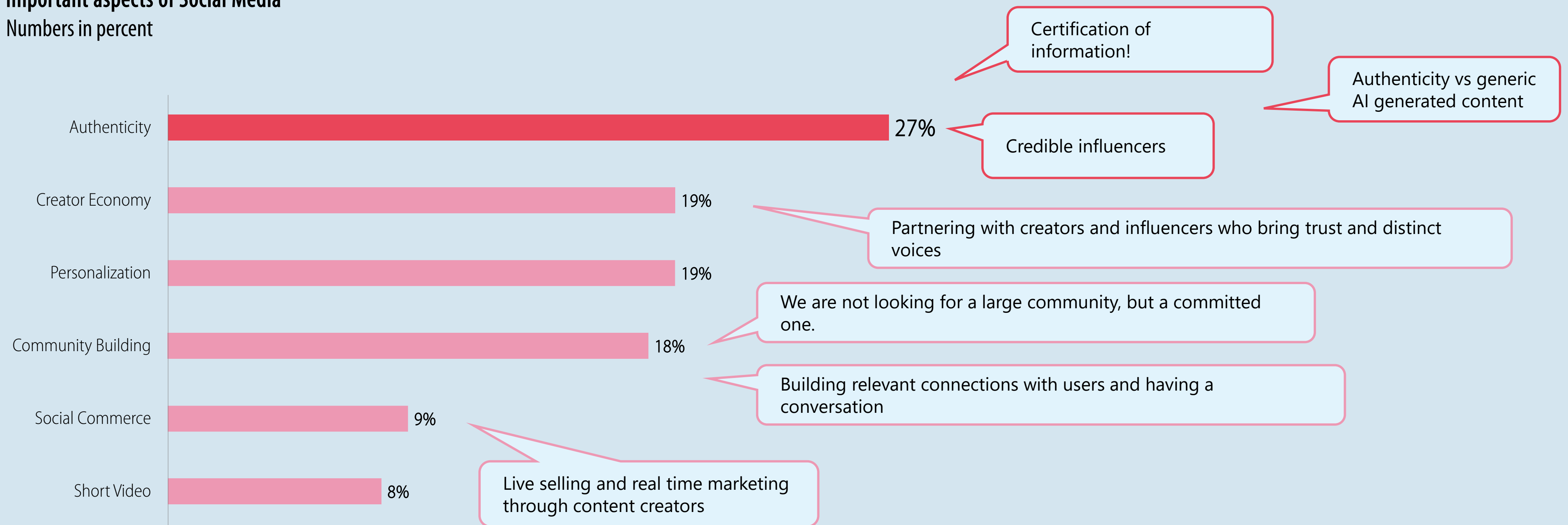
4b

Which aspect of social media will be particularly important and why?

REACH IS OVER!

Fake won't work: Authenticity is key and more a survival factor than "nice to have". But the main question remains: How, where and by which means tools will we be perceived as genuine by the right people?

Important aspects of Social Media
Numbers in percent



Question: Which aspect of social media will be particularly important and why? Base: N = 523 (Social media and influencer marketing are considered "very important" or "important")



In 2026, the most important aspect of social media will be verifiable authenticity. **THE DIFFERENCE BETWEEN WINNING AND LOSING BRANDS WILL BE** whether they manage to build real, human and trustworthy conversations and communities amid a sea of artificial content.



GONZALO SAIZ

Program Chair Forbes CMO
FORBES España

What's your superpower? Which capabilities and skills does a CMO need to have these days to make their organisation fit for the future?

5

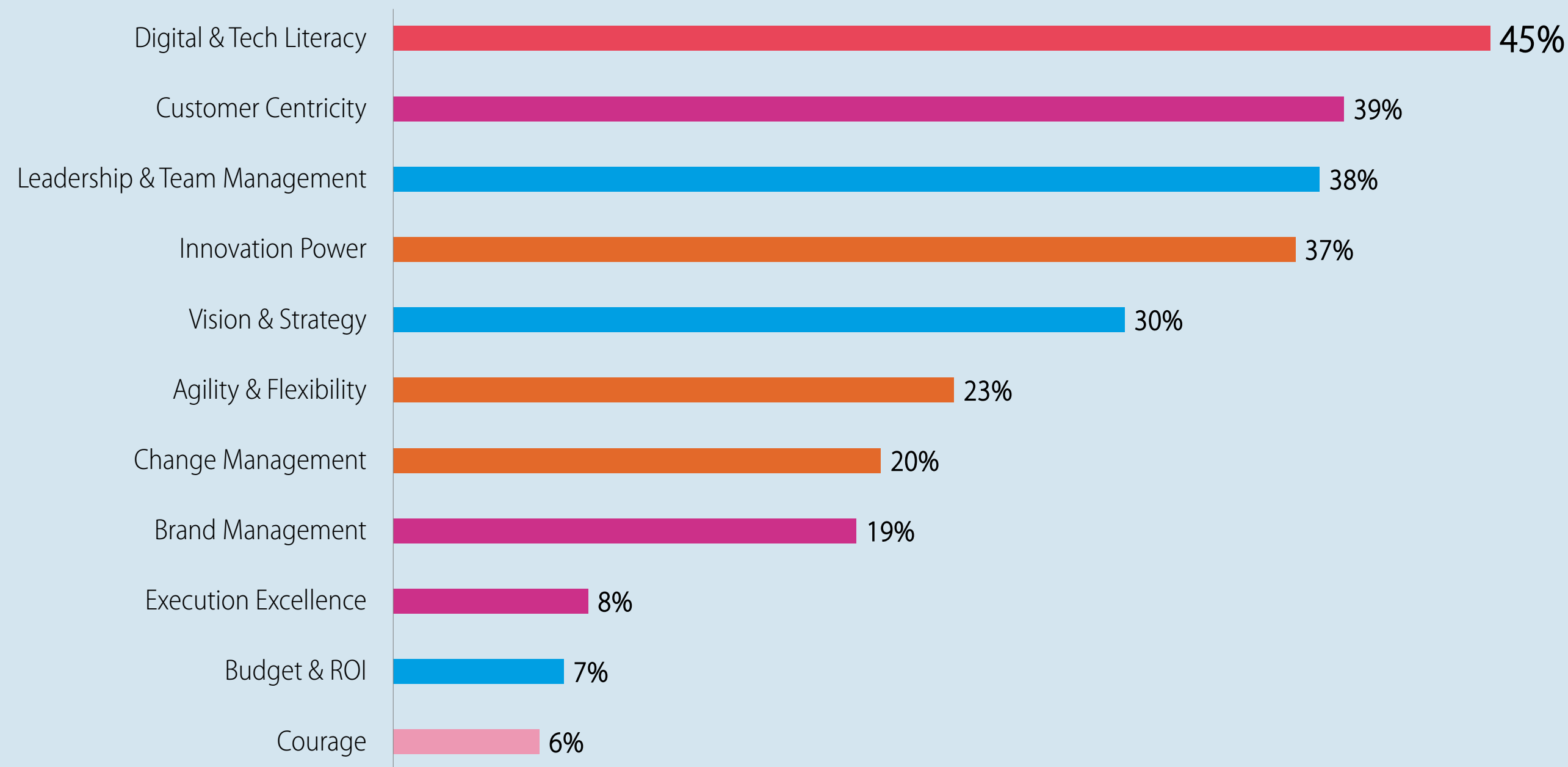


AI IS THE BOSS'S BUSINESS!

It's not about specialization, but integration: The true CMO superpower lies in uniting diverse – and often contradictory – skills. By 2026, they see themselves as Chief Transformation Officers.

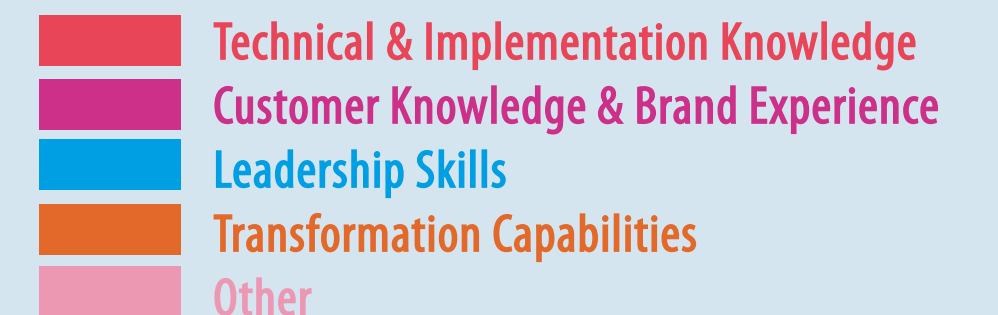
CMO Superpowers 2026

Derived topic clusters, numbers in percent, multiple mentions possible



Key paradoxes to integrate:

- Living Tech × Showing the Human side
- Speed in Implementation × Stability in Strategy
- Being Creative x Staying Analytical
- Deliver Efficiency × Push Innovation



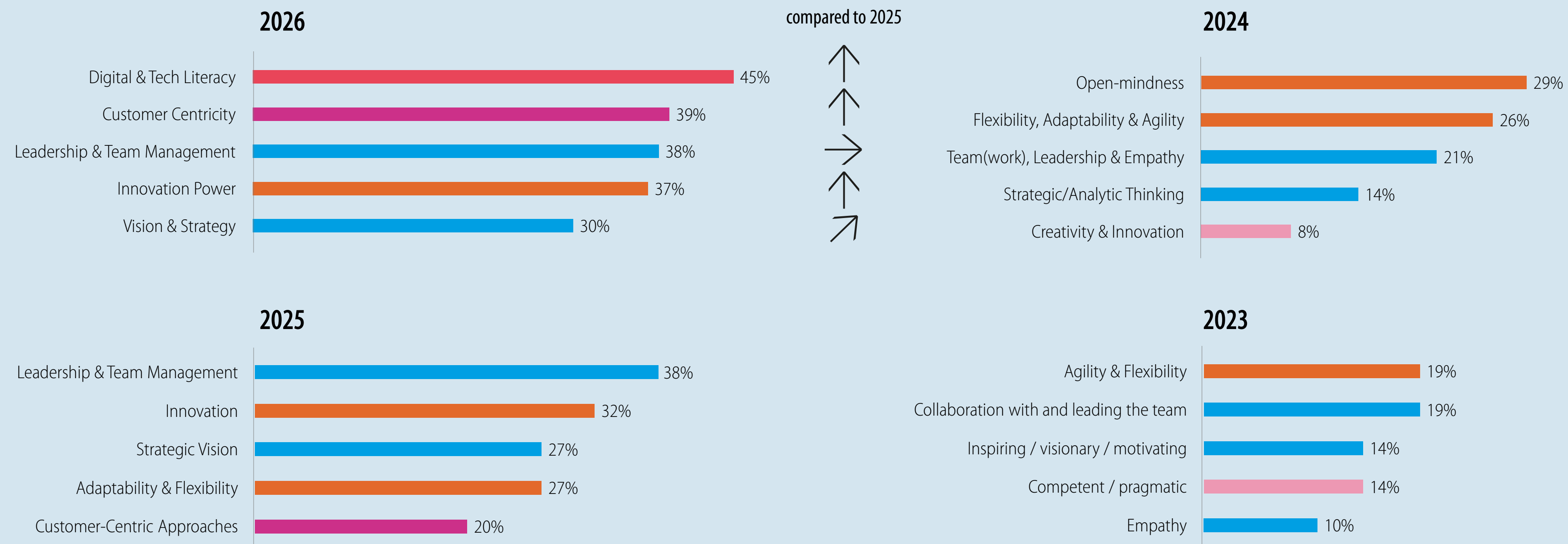
Question: What's your superpower? Which capabilities and skills does a CMO need to have these days to make their organisation fit for the future? Base: N = 805

NO TECH SKILLS? GAME OVER!

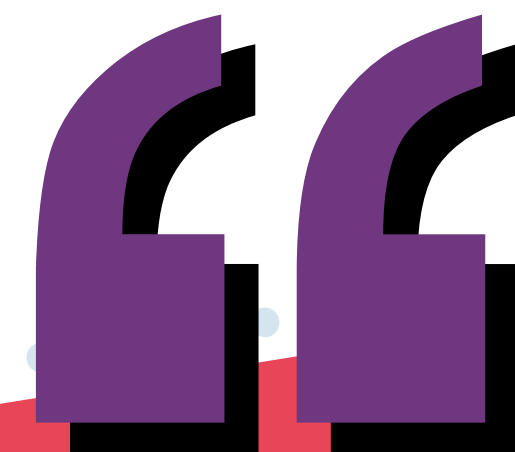
Open-mindedness and flexibility have taken a backseat, and even traditional leadership skills are falling victim to the new challenges posed by AI.

CMO Superpowers Top 5

Derived topic clusters, numbers in percent, multiple mentions possible



Question: What's your superpower? Which capabilities and skills does a CMO need to have these days to make their organisation fit for the future? Base: N = 805



MY SUPERSKILL? BEING A CHANGE AGENT!
Marketing processes, teams and skills will have to change massively and we need the vision to see what will be possible, implement early, learn, and upskill our teams.

DOMINIQUE WEISS
Interim Manager & Fractional CMO,
brandinterim



My 'superpower' is connecting vision and reality: seeing clearly where the organisation needs to go and building the human, cultural and operational conditions to actually get there **I BELIEVE THAT TODAY'S CMO CAN NO LONGER LIMIT THEMSELVES TO LEADING MARKETING:** they must be an architect of transformation, capable of bringing together purpose, data and people.

SARA TERRANEO

eCommerce and Omnichannel Director,
Arcaplanet




THE NEW CMO IS A 'NEXT HUMAN' WHO EMBODIES AI AND AUTHENTICITY. They need to understand tech and have strong people skills to lead their teams successfully through this transformation.



FELIX BARTELS
CMO Serviceplan Group Germany

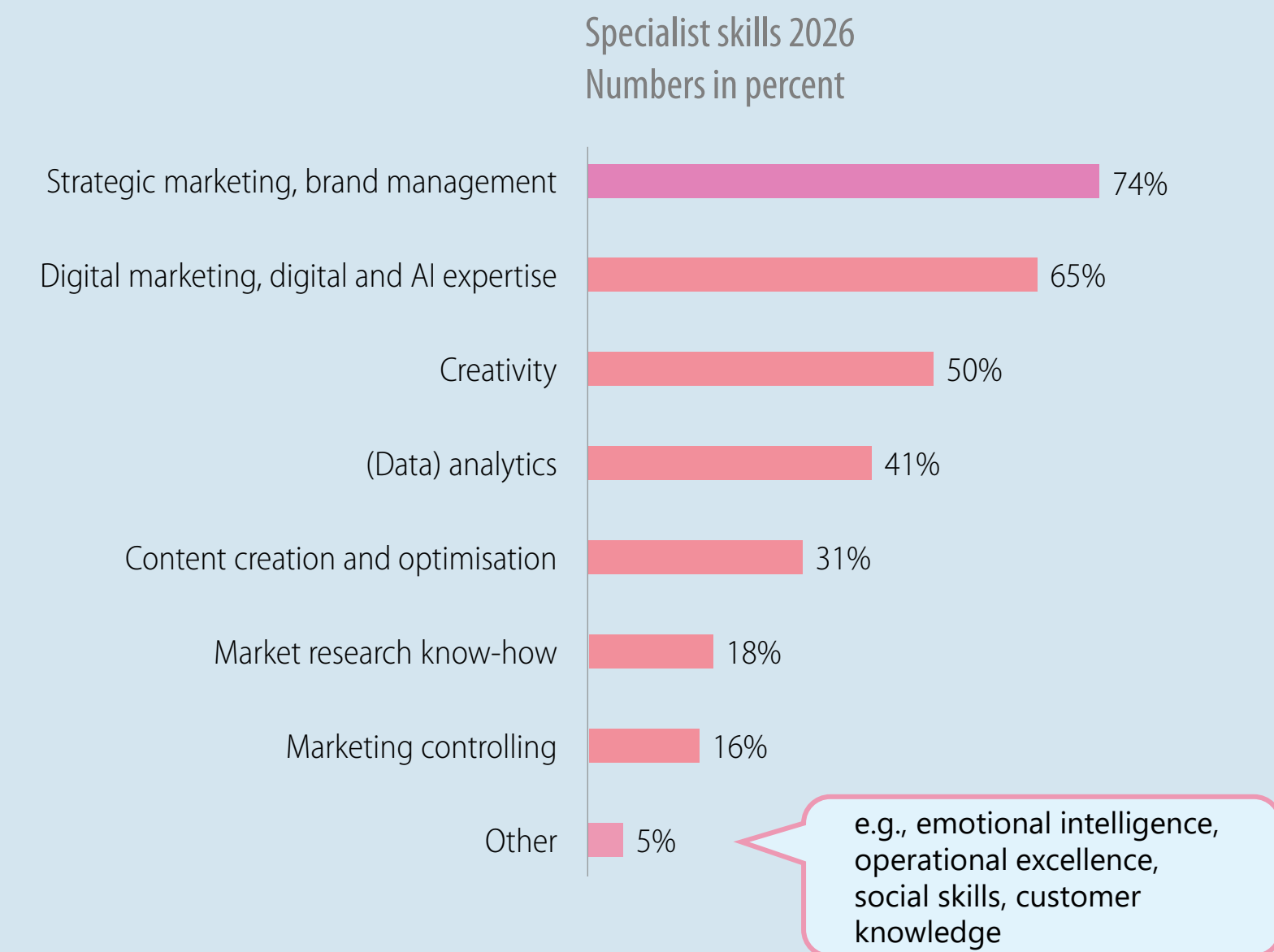
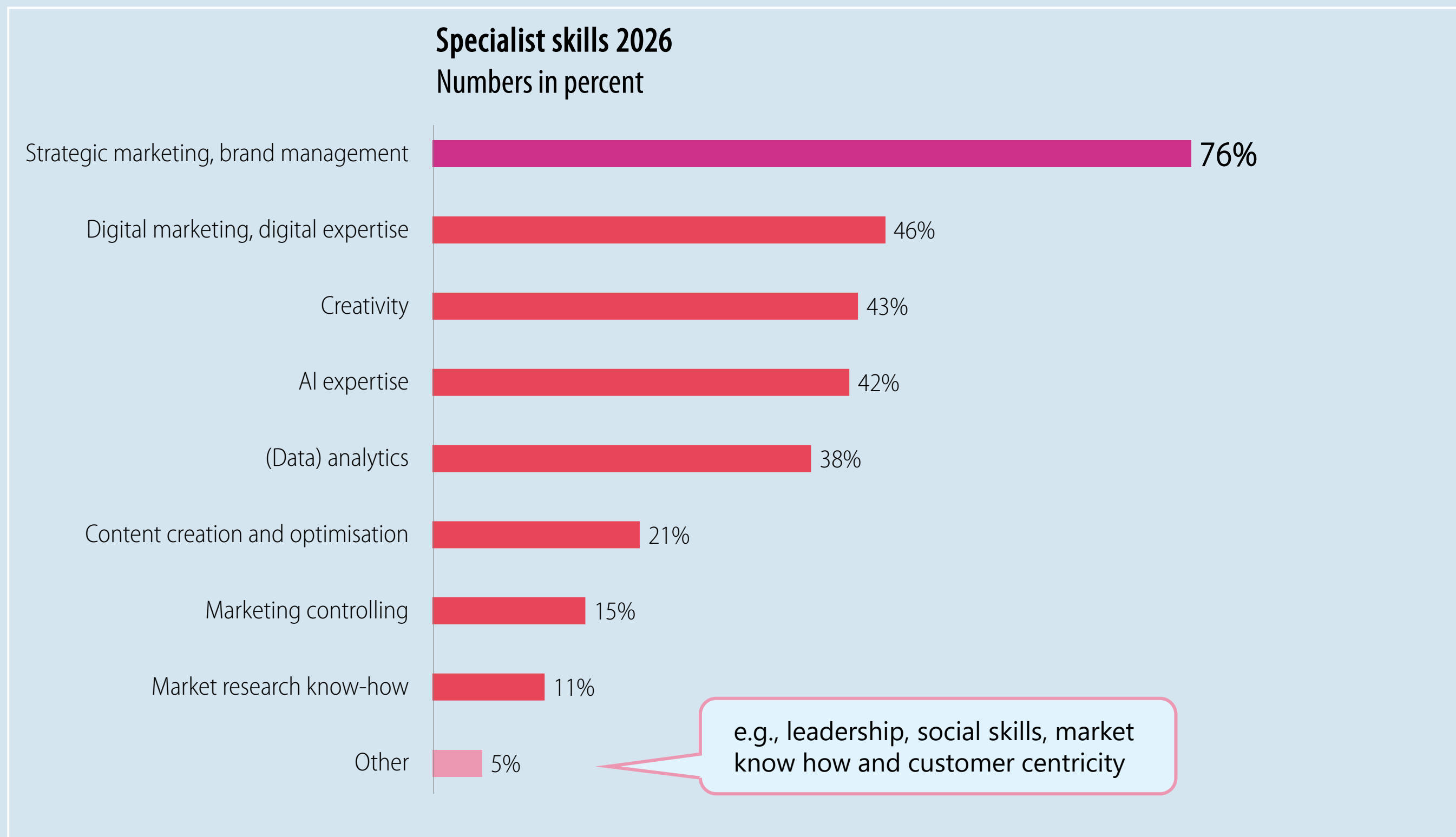
6



Which specialist skills should a successful marketing team have?

TALK LESS, THINK LONG-TERM!

Strategy and brand now dominate – digital, creativity, and AI skills follow. CMOs are steering away from buzzwords toward real business impact, proving that real transformation begins with substance.

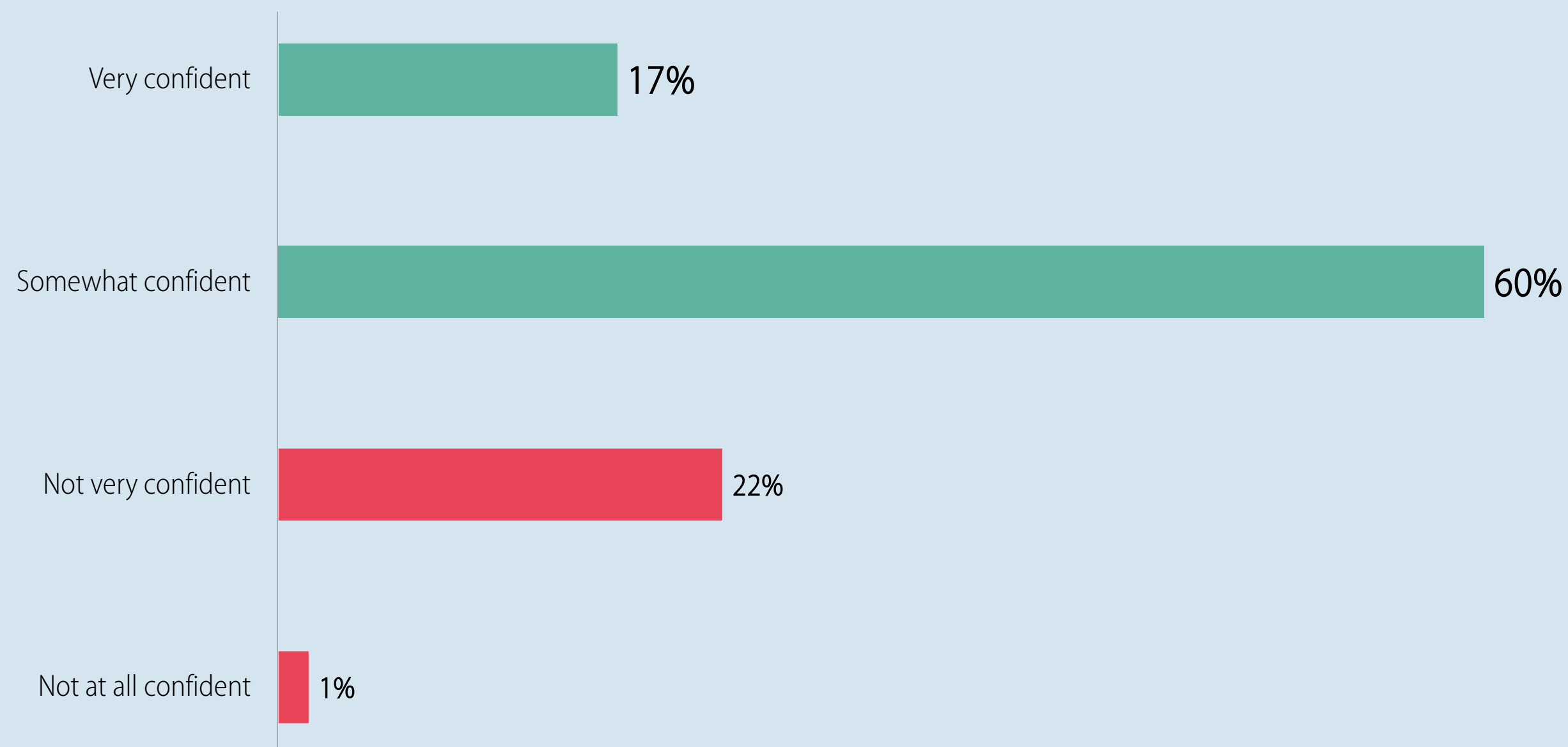


Question: Which specialist skills should a successful marketing team have? Base: N = 805


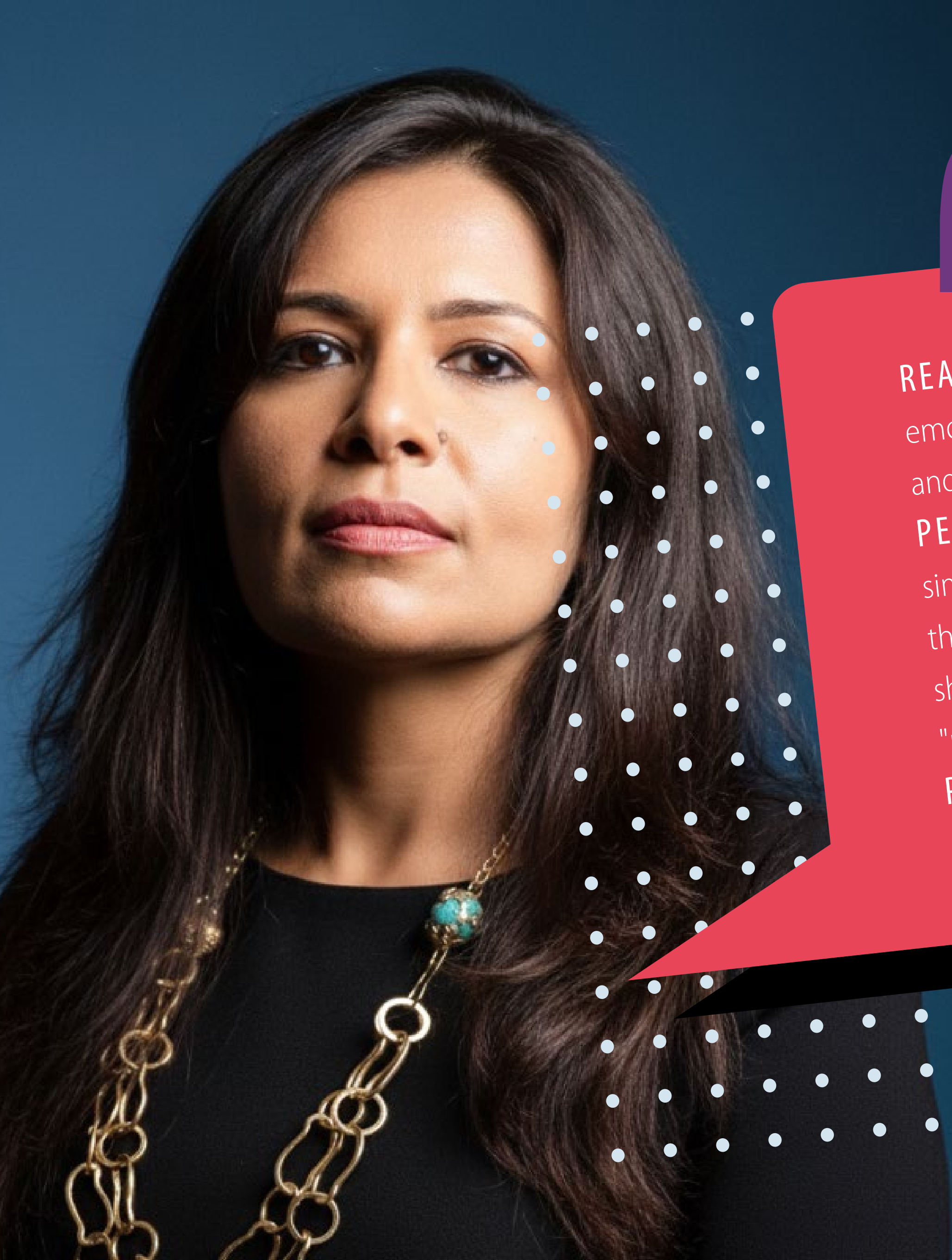
FUTURE'S HERE. SO IS THE TEAM?

The majority of CMOs are satisfied with their team – more or less. Only 17% are confident that they are prepared for the next three years, and one in five are even concerned.

Confidence in the team skills in the next three years
Numbers in percent



Question: How confident are you that your marketing team has the right skills to be successful in the next two to three years? Base: N = 805



REAL-TIME EMPATHY AT SCALE - the ability to instantly understand the emotional and psychological state of every customer across all touchpoints and respond with perfect timing and relevance. **THIS GOES WAY BEYOND PERSONALIZATION.** It's about reading the room with millions of customers simultaneously. When someone's browsing your site at 2am, is it because they're excited about a project or anxious about a problem? The response should be completely different. The reason I'd choose this over something like "perfect attribution" or "flawless targeting" is that **EMOTION DRIVES EVERY PURCHASE DECISION**, but we're still mostly guessing at it. We optimize for clicks and conversions, but miss the human experience.

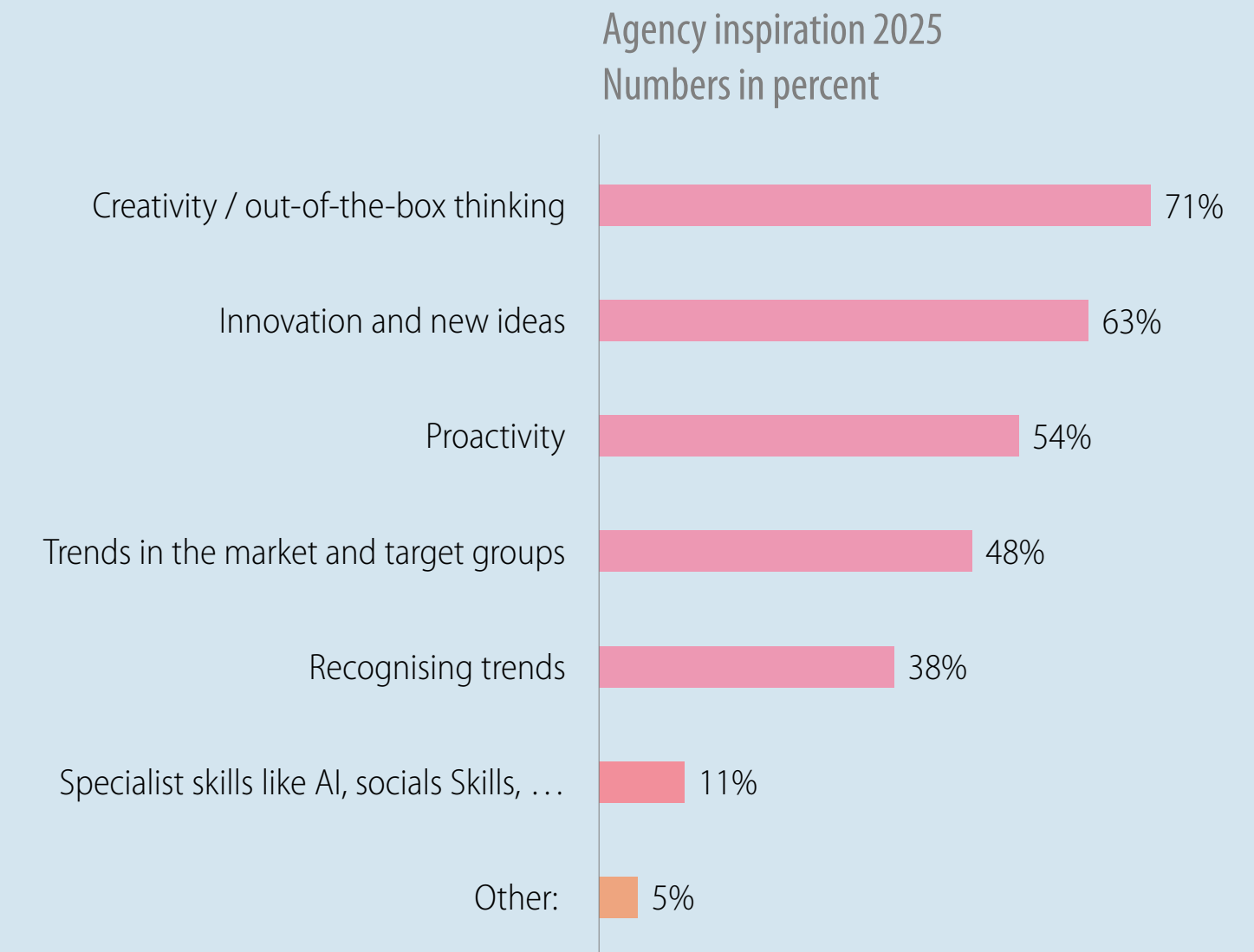
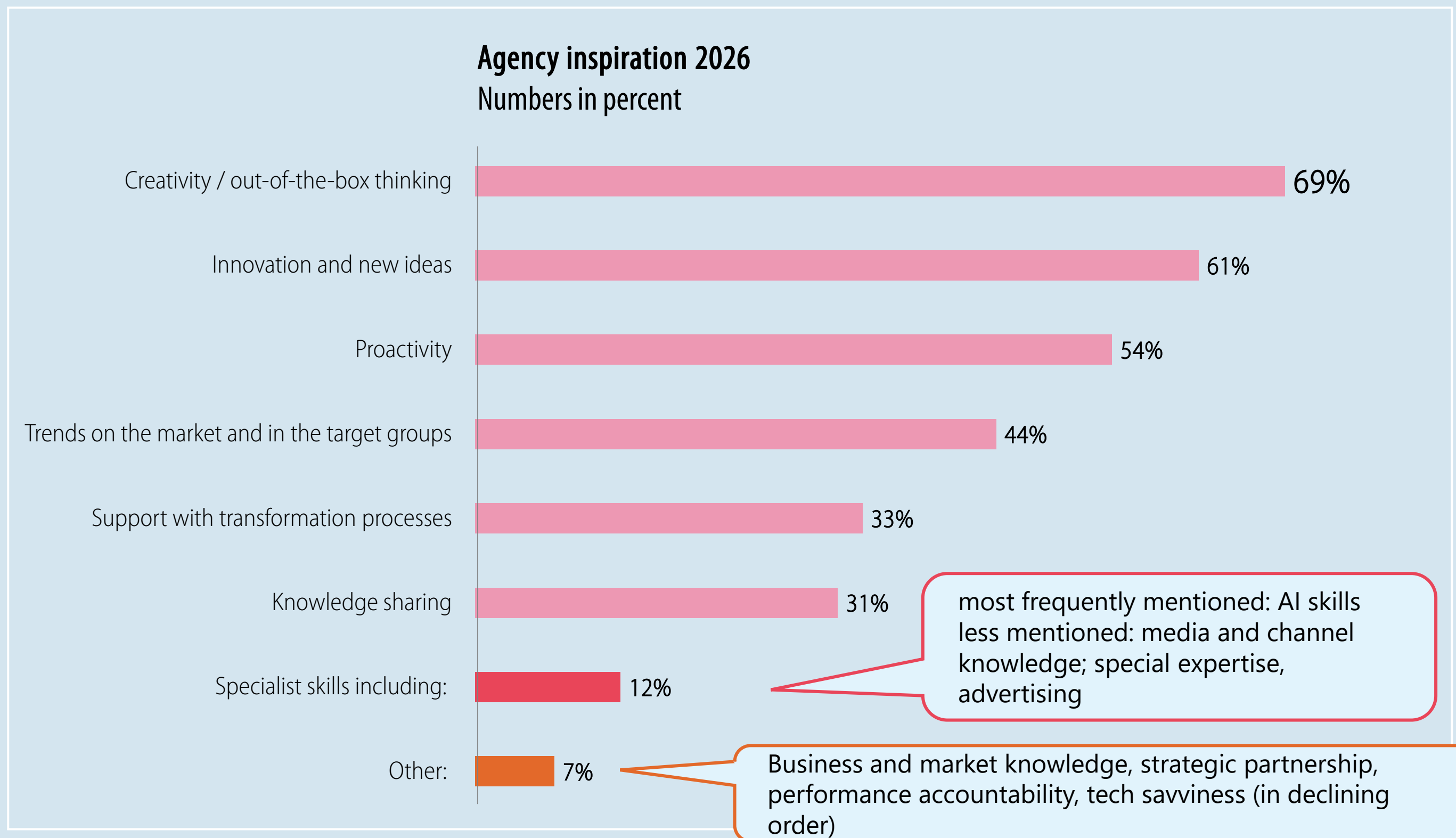
NAMRATA BALWANI
Chief Marketing Officer,
TPConnect Technologies

7

What kind of inspiration do you expect from your agency partners in the future?

ORIGINALITY NEVER GETS OLD!

The brief hasn't changed: be bolder, think fresher, act first. CMOs still expect agencies to lead that way – maybe because AI doesn't think out-of-the-box? But now, one in three CMOs expects transformation support on top.



Question: What kind of inspiration do you expect from your agency partners in the future? Base: N = 805

UNITED BY CREATIVITY.

Despite all the challenges posed by AI, CMOs across markets speak with one voice: out-of-the-box thinking, innovation, and proactivity remain the universal must-haves – or are these the very things AI can't do?

Agency inspiration 2025: Highest ranks sorted by the top 2 values (very important + important)

Numbers in percent

	DE (n= 192)	AT (n= 28)	CH (n=153)	BELUX (n= 42)	NE (n =107)	ES (n=38)	FR (n= 32)	IT (n=91)	UK (n= 47)	ME (n=56)	NORD (n=19*)	Overall (n=805)
Creativity / out-of-the-box thinking	71%	61%	71%	69%	58%	63%	84%	70%	64%	73%	58%	69%
Innovation and new ideas	62%	78%	63%	57%	56%	61%	63%	51%	72%	68%	63%	61%
Proactivity	56%	61%	40%	57%	46%	63%	75%	58%	62%	68%	42%	54%
Trends on the market and in the target groups	48%	56%	48%	31%	35%	21%	41%	46%	55%	52%	37%	44%
Support with transformation processes	35%	22%	27%	43%	23%	47%	38%	35%	36%	34%	37%	33%
Knowledge sharing	25%	28%	29%	36%	33%	18%	38%	23%	57%	43%	32%	31%
Specialist skills	11%	11%	7%	17%	12%	5%	19%	19%	15%	14%	16%	12%
Other	8%	11%	8%	2%	7%	8%	0%	3%	4%	9%	11%	7%

Question: What kind of inspiration do you expect from your agency partners in the future? Base: N = 805

*Evaluation is not representative due to the small number of responses.

=Highest Top 2 value
 =Second highest Top 2 value



What kind of inspiration do you expect from your agency partners in the future?

CENTRAL FINDINGS ACROSS MARKETS

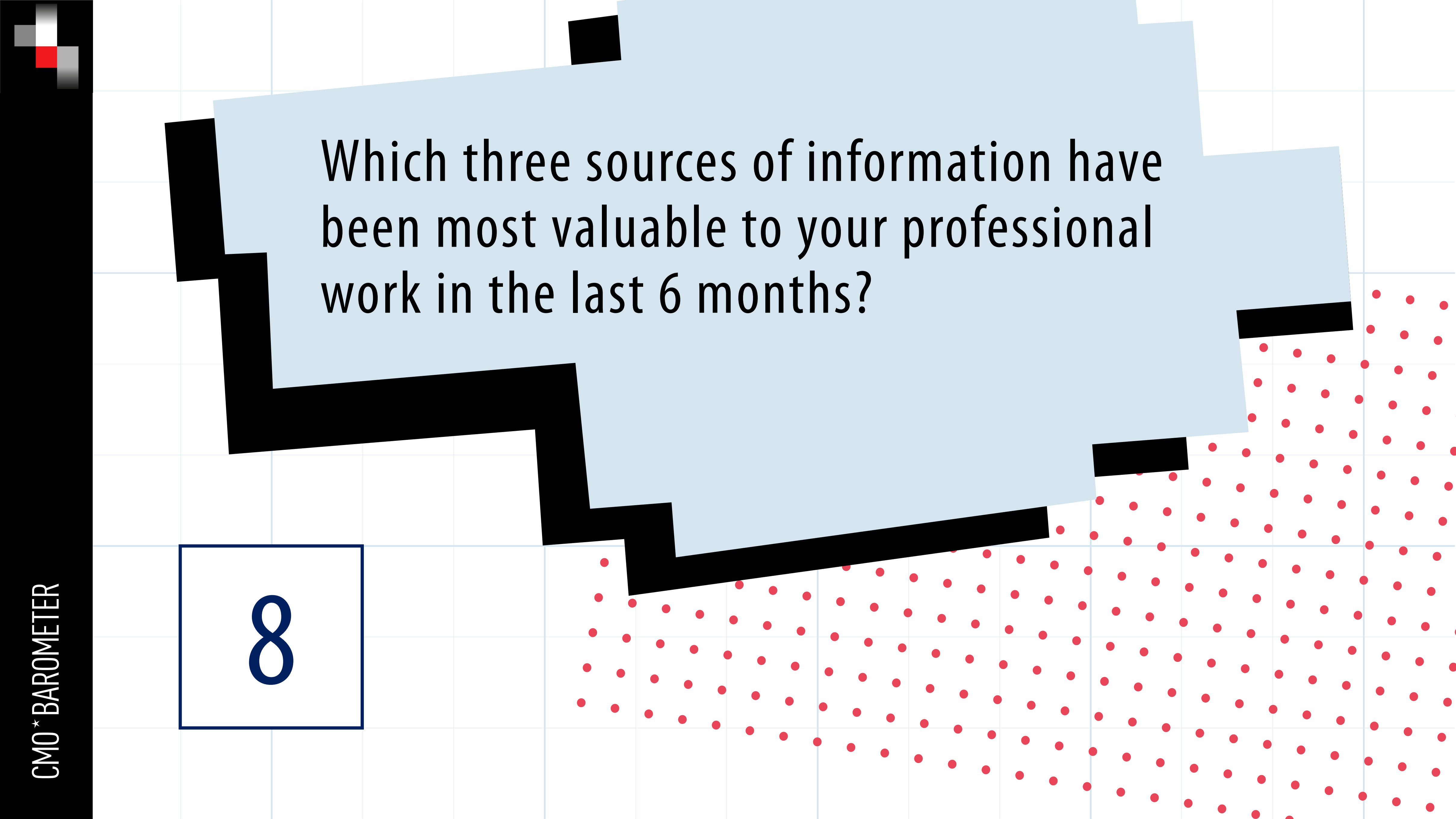
In France, creativity is especially important (84%) compared to other countries like the Netherlands (58%) and Nordics (58%).

Proactivity is as important as creativity in Spain, and therefore ranks top (63%).

In Spain in particular, almost half of all CMOs expect agencies to support them in the transformation process (47%).

More than half of CMOs in Austria, the UK, and the Middle East consider identifying trends to be an important or very important task for agencies.

Unlike other countries, knowledge sharing ranks quite highly in the UK (57%).

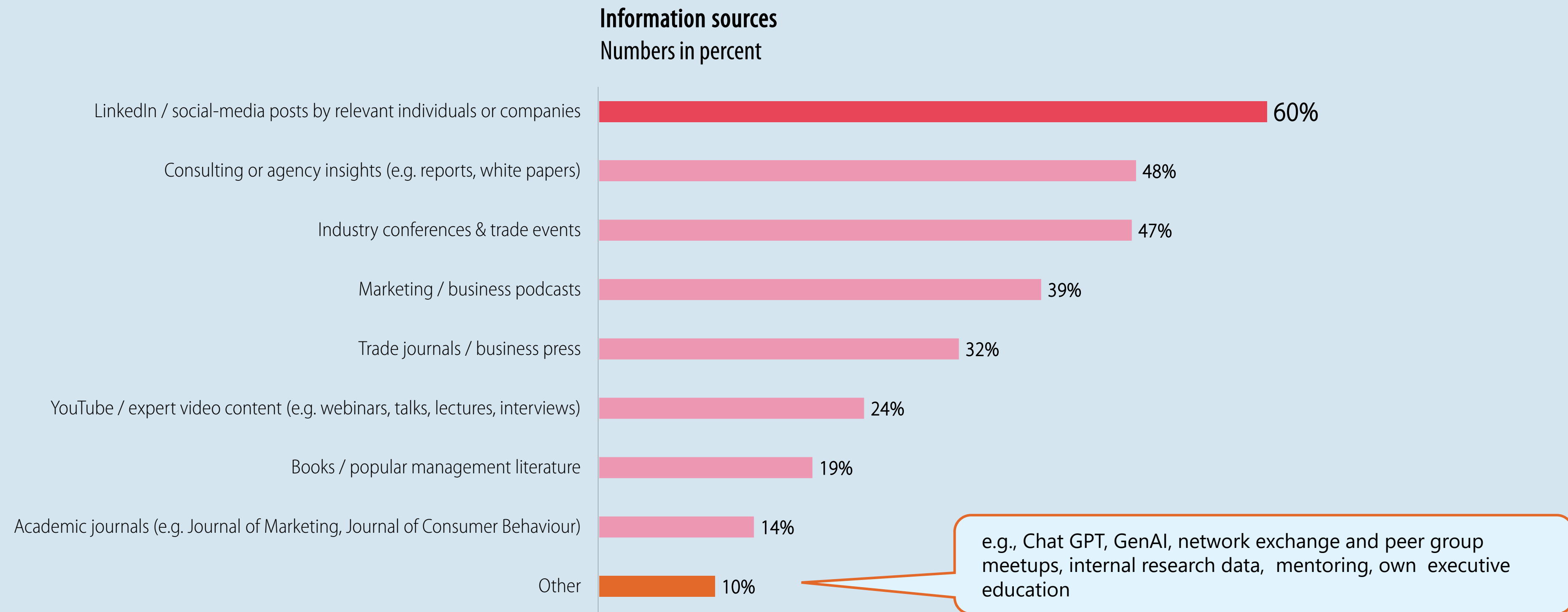


Which three sources of information have been most valuable to your professional work in the last 6 months?

8

IS AI ONLY ON THEIR AGENDA?

AI could help – if anyone asked. But when it comes to inspiration, CMOs turn to LinkedIn and Social Media first, followed by consulting or agency insights and real-world events.



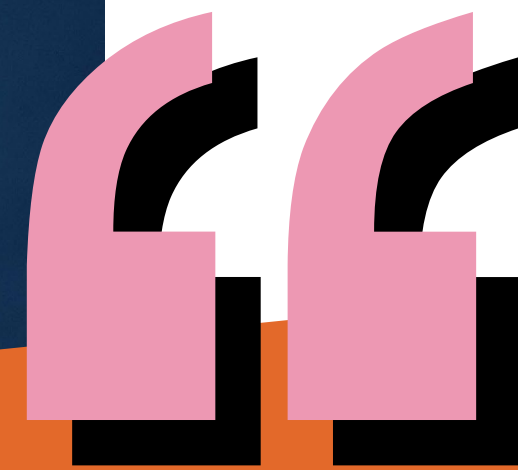
Question: Which three sources of information have been most valuable to your professional work in the last 6 months? Base: N = 805



When the playing field of the global economy is realigned,
HUMAN NETWORKS WILL BECOME A SAFE ZONE
FOR CMOS amid the transformation.

YVONNE WICHT

Chairwoman „CMO of the Year“ Council
Serviceplan Group



A CLOSE LOOK AT THE SOUL OF CMOs SHOWS THE HARD REALITY: it is no longer just about 'colourful images' and 'supporting sales'. Rather, it is apparent that marketing is developing into a central performance tool for a modern company, where target definition, brand development, trust building and +technical implementation converge – for a maximum in ROI. **IN 2026, AGENCIES WILL HAVE TO WORK EVEN HARDER TO UNDERSTAND THE MANIFOLD CHALLENGES.** Meet the requirements and bring back a sense of ease and passion into the everyday life of the CMO.

JULIA ZIMMERMANN

Executive Partner,
Future Market Management Consultant



The CMO Barometer emphasizes that marketing science and practice must work together even more closely in the future in order to provide effective marketing knowledge. Scientific publications alone are rarely taken into account in practice—DIGITAL, CREATIVE, and DIGESTIBLE knowledge exchange is what is needed.



PROF. DR. SVEN REINECKE

Executive Director,
University of St. Gallen



ABOUT

COUNTRIES & REGIONS

15



CMO BAROMETER

The CMO Barometer is an annual study surveying top marketers from 14 European countries and the Middle East. Now in its seventh edition, it is conducted by Serviceplan Group in collaboration with the University of St. Gallen and executive search firm Heidrick & Struggles.

UNIVERSITY OF ST. GALLEN (HSG)

The Institute of Marketing & Customer Insight at the University of St. Gallen (HSG) is a world-leading academic institution that enjoys the highest recognition of their contributions to academia, practice, politics, and society in the field of marketing and customer insight.

Heidrick & Struggles

Heidrick & Struggles is the world's foremost advisor on executive leadership, driving superior client performance through premier human capital leadership advisory services. For more than 70 years, we've delivered value for our clients by leveraging unrivaled expertise to help organizations discover and enable outstanding leaders and teams.

Learn more at www.heidrick.com.

SERVICEPLAN GROUP

Serviceplan Group is Europe's largest independent, partner-led agency group. Founded in 1970 as a traditional ad agency, it quickly developed the "House of Communication" concept — the only fully integrated agency model in Europe today, combining Creative & Content, Media & Data, and Experience & Commerce under one roof. With 43 owned offices and additional partnerships, Serviceplan operates in 24 countries and all major economic regions worldwide.

CMOs

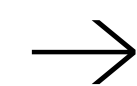
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THANK

YOU!



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