MIND THE GAP!

Between AI ambition and organizational reality

CMO BAROMETER

IN COOPERATION WITH

SERVICEPLAN GROUP HOUSE OF COMMUNICATION

University of St.Gallen
Institute for Marketing and Customer Insight

HEIDRICK & STRUGGLES

seven.one MEDIA

LinkedIn



Technology can make marketing faster and more efficient. But it cannot decide what a brand should stand for.

FLORIAN HALLER
CEO Serviceplan Group

Perhaps 2027 will be the year we start looking ahead again, rather than simply navigating by sight.

The first signs are encouraging. After years of uncertainty and restraint, optimism is slowly returning. We are not out of the woods yet, and the picture varies from market to market. But economic expectations and marketing budgets both point cautiously in a more positive direction.

AI remains the defining topic, but the conversation is becoming more mature. The hype is giving way to a sharper focus on what actually works, what creates value and what delivers a return. AI is no longer an experiment at the margins of marketing. It is becoming part of its operating model.

That means marketing organizations have to evolve as well. The CMO is increasingly becoming a transformer who connects technology, data, growth, brand and the business itself. Marketing is becoming THE key board function built around the customer. I guess the CMO of the future will be a Chief Customer Officer.

At the same time, branding is becoming more important. When everyone has access to similar AI tools and capabilities, technology alone is no longer a differentiator. The human factor makes the difference: the ideas we create, the judgement we apply and the trust and security brands provide. Technology can make marketing faster and more efficient. But it cannot decide what a brand should stand for.

This transformation is also changing the role of agencies. Our task is no longer simply to support execution. We need to be innovators and transformation partners – bringing AI expertise, creativity and new ideas to the table, challenging established approaches and helping CMOs turn possibilities into business impact.

And to the CMOs reading this: we are at your side. It takes curiosity, a willingness to keep learning and the courage to take the next step, even when not every answer is clear yet.

STUDY PROFILE

SAMPLE SIZE

N=655

DE	134	FR	18
AT	47	IT	72
CH	88	UK	33
BE&LUX	43	ME	55
NL	49	PL	49
ES	41	NORDICS	26

DURATION

10 min median completion time

LOCATION

Europe (incl. Middle East)

SAMPLE

CMOs / Marketing decision makers

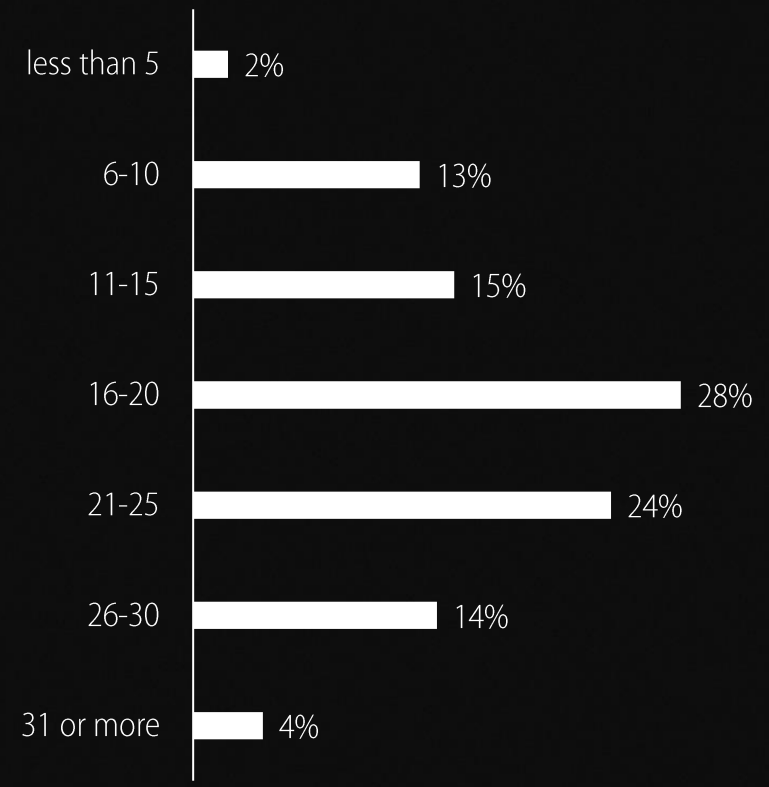
FIELD TIME

September 3 – 25 2026

METHOD

Online survey

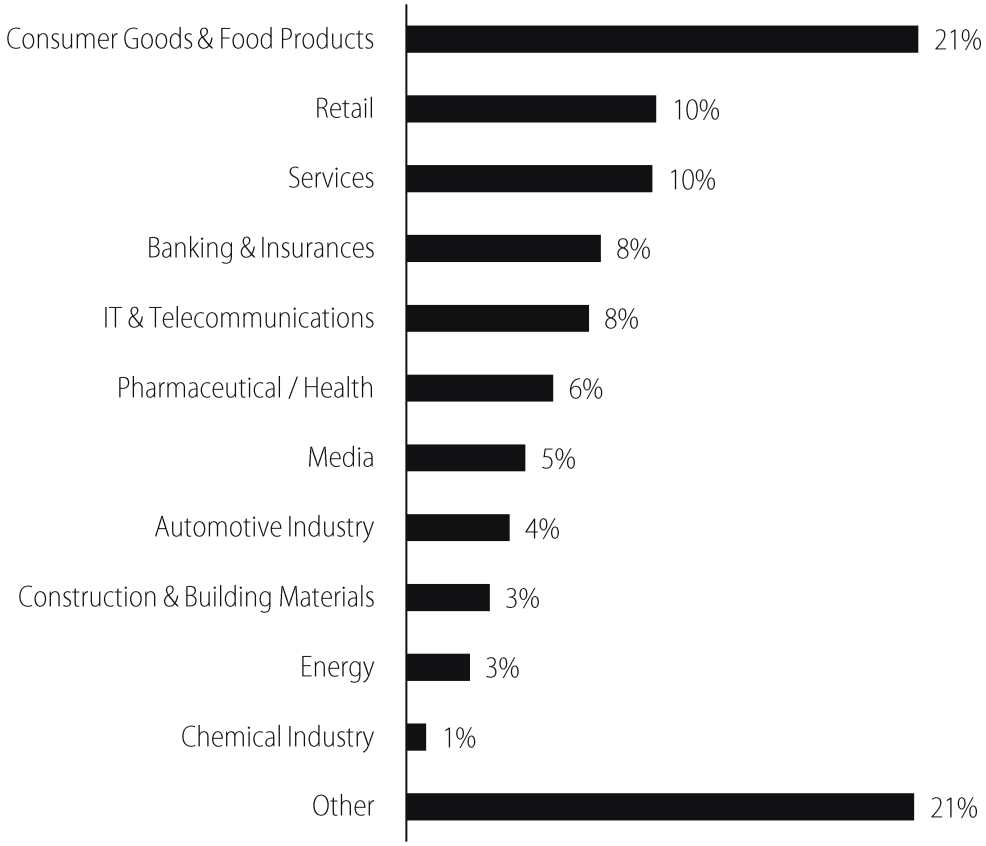
EXPERIENCE Mean: 20 years



QUESTION: Approximately how many years have you been working in marketing?
Base: N = 655

SAMPLE DESCRIPTION

INDUSTRY



QUESTION: In which industry is your company active? Base: N = 655

COMPANY SIZE



QUESTION: Please tell us how many employees work in your company. Base: N = 655

BUSINESS MODEL



QUESTION: What is your company's primary business model? Base: N =655

TYPE OF ORGANIZATION



QUESTION: What type of organization best describes your company? Base: N = 655

BROAD PERSPECTIVE: PARTICIPANTS FROM 12 MARKETS ON 2 CONTINENTS

01	Poland	02	BeLux	03	Germany
04	France	05	Austria	06	Spain
07	Italy	08	Switzerland	09	United Kingdom
10	Middle East	11	Nordics*	12	Netherlands

*Nordics= Denmark, Sweden, Norway, Finland

7 QUESTIONS REGARDING TRENDS, CHALLENGES AND SKILLS IN MARKETING 2027

01

How do you think the economic situation in your sector will develop in 2027?

02

How will your marketing budget for 2027 develop?

03

In your opinion, what is the hot topic for the marketing year of 2027?

04

How important do you think the following marketing trends will be in 2027?

05

What is the evolving role of the CMO within your organisation, and which capabilities and skills are essential to make the organisation fit for the future? Please explain your reasoning.

06

Which specialist skills do your marketing teams need to develop in order to be successful?

07

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

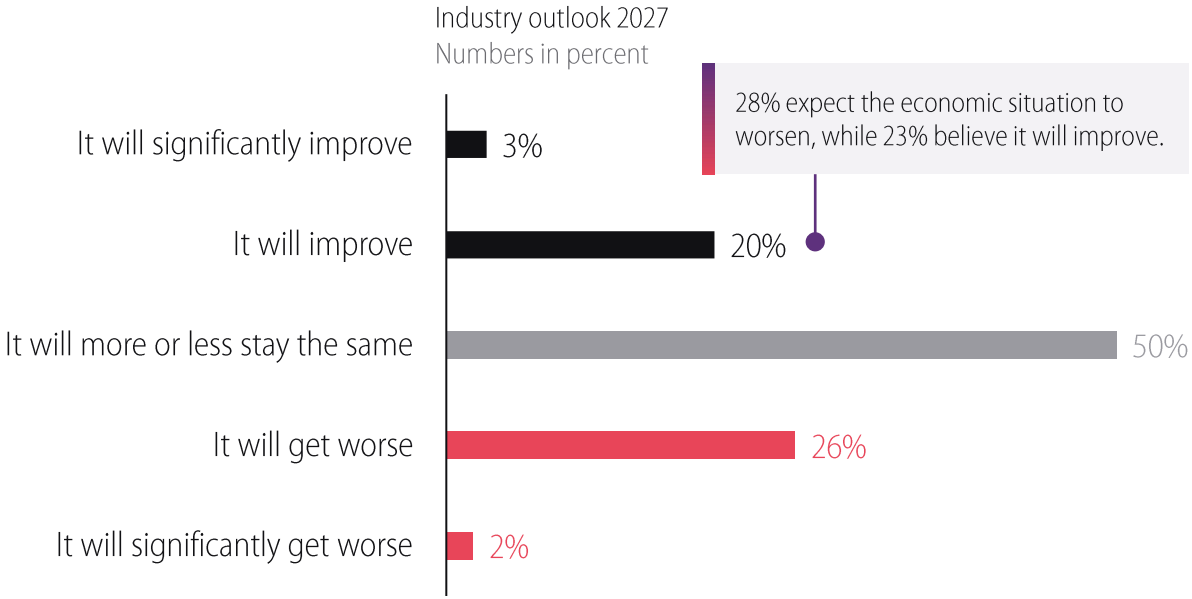
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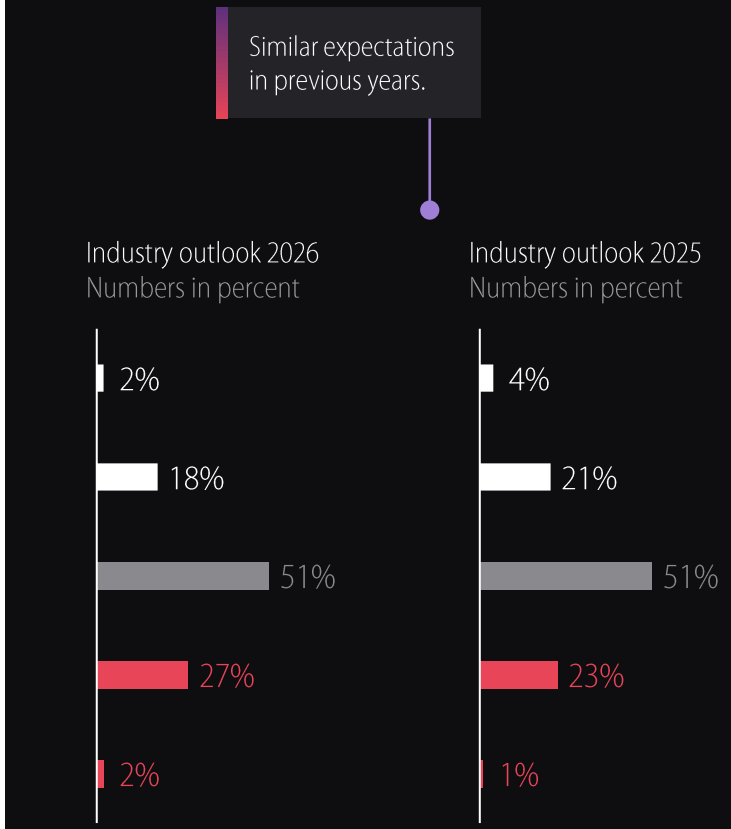
CHAPTER 01

How do you think the economic situation in your sector will develop in 2027?

IS THE TIDE TURNING?

For the third year running, half expect no change, with slightly more pessimists than optimists. But the outlook is marginally more positive than last year.





Question: How do you think the economic situation in your sector will develop in 2027? Base: N = 655

STEADY OVERALL, DRIFTING MARKETS

The Middle East stays most optimistic – elsewhere, confidence rises or falls.

Confidence rises most in Switzerland and Spain.

FR, ME and NORD are more optimistic than in 2026.

Industry outlook 2027 (sorted by country)
Numbers in percent

	DE (n=134)		AT (n=47)		CH (n=88)		ES (n=41)		NE (n=49)		BELUX (n=43)		FR (n=18*)		IT (n=72)		UK (n=33)		ME (n=55)		NORD (n=26*)		PL (n=49)		Overall (n=655)	
	'26	'27	'26	'27	'26	'27	'26	'27	'26	'27	'26	'27	'26	'27	'26	'27	'26	'27	'26	'27	'26	'27	'26	'27	'26	'27
It will improve	17%	15%	17%	6%	10%	25%	11%	27%	21%	22%	12%	2%	16%	22%	25%	28%	23%	18%	52%	53%	26%	31%	N.A.	24%	20%	22%
It will stay the same	58%	54%	56%	53%	54%	52%	66%	46%	51%	55%	52%	44%	53%	61%	41%	58%	43%	39%	32%	33%	42%	42%	N.A.	49%	51%	50%
It will get worse	25%	31%	28%	40%	36%	23%	24%	27%	27%	22%	36%	53%	31%	17%	34%	14%	34%	42%	16%	15%	32%	27%	N.A.	27%	29%	28%

DE, AT, BELUX and UK expect conditions to get worse

ME most optimistic

Question: How do you think the economic situation in your sector will develop in 2027? Base: N = 655
Note. Colour highlights based on comparison with 2026 and to indicate the highest / lowest values. Smaller samples (n<30) are marked with an asterisk (*) and their findings should be treated as tendencies only.

CENTRAL FINDINGS ACROSS MARKETS

How do you think the economic situation in your sector will develop in 2027?

01 **The Middle East stays the most optimistic market**
More than half expect a better year.

02 **Confidence falls in Germany, Austria, BELUX and the UK**
More expect a worse year than in 2026.

03 **Germany**
Pessimists outnumber optimists two to one (31% vs. 15%).

04 **Steady overall**
Half expect no change in the economic situation – for the third year running.

05 **Confidence rises in Switzerland and Spain**
Expectations of improvement more than double since 2026.

06 **BELUX and Austria are the gloomiest**
Only 2% and 6% expect a better year.

07 **Italy is the least pessimistic market**
Only 14% expect the economic situation to get worse.

SOME SECTORS SHIFT GEARS

Confidence grows in several sectors – most others expect their economic situation to stay much the same.

Automobile
stronger outlook with less pessimists

Construction
Fewer respondents expect stability, with stronger shifts towards both optimism and pessimism.

IT & Telecommunications
still more optimists than pessimists

Media
Strongest upswing: almost 4 times as many optimists

Industry outlook 2027 (sorted by sector)
Numbers in percent

	Automobile industry (N=26*)		Banking & Insurances (N=49)		Construction & Building Materials (N=21*)		Chemical industry (N=5*)		Services (N=62)		Energy (N=16*)		Retail (N=63)		IT & Telecommuni-cations (N=46)		Consumer Goods & Food Products (N=129)		Media (N=30)		Pharmaceutical / Health (N=37)		Other (N=128)		Total (N=655)	
	'26	'27	'26	'27	'26	'27	'26	'27	'26	'27	'26	'27	'26	'27	'26	'27	'26	'27	'26	'27	'26	'27	'26	'27	'26	'27
It will improve	22%	27%	24%	20%	17%	33%	N.A.	40%	19%	27%	38%	19%	17%	17%	36%	35%	17%	16%	8%	30%	9%	16%	23%	30%	23%	22%
It will stay the same	26%	35%	54%	67%	69%	38%	N.A.	40%	45%	48%	38%	75%	58%	65%	40%	43%	50%	53%	54%	33%	68%	51%	52%	44%	51%	50%
It will get worse	52%	38%	22%	12%	14%	29%	N.A.	20%	35%	24%	25%	6%	26%	17%	23%	22%	33%	32%	38%	37%	24%	32%	25%	27%	29%	28%

Question: How do you think the economic situation in your sector will develop in 2027? Base: N = 655
Note. Colour highlights based on comparison with 2026 and to indicate the highest / lowest values. Smaller samples (n<30) are marked with an asterisk (*) and their findings should be treated as tendencies only.

Energy
Less pessimists and more expect stability

Pharma & Health
More pessimists and less expected stability

CENTRAL FINDINGS ACROSS SECTORS

How do you think the economic situation in your sector will develop in 2027?

01 **Same course**
In most sectors, the largest group expects no change.

02 **Automotive remains the most pessimistic, but far less so than last year.**

03 **Confidence rises in Media and Services**
More expect a better year than in 2026.

04 **IT & Telecommunications stays confident**
35% expect improvement, as in 2026.

05 **Consumer Goods & Food, the largest sector, leans pessimistic**
Twice as many expect a worse year as a better one.

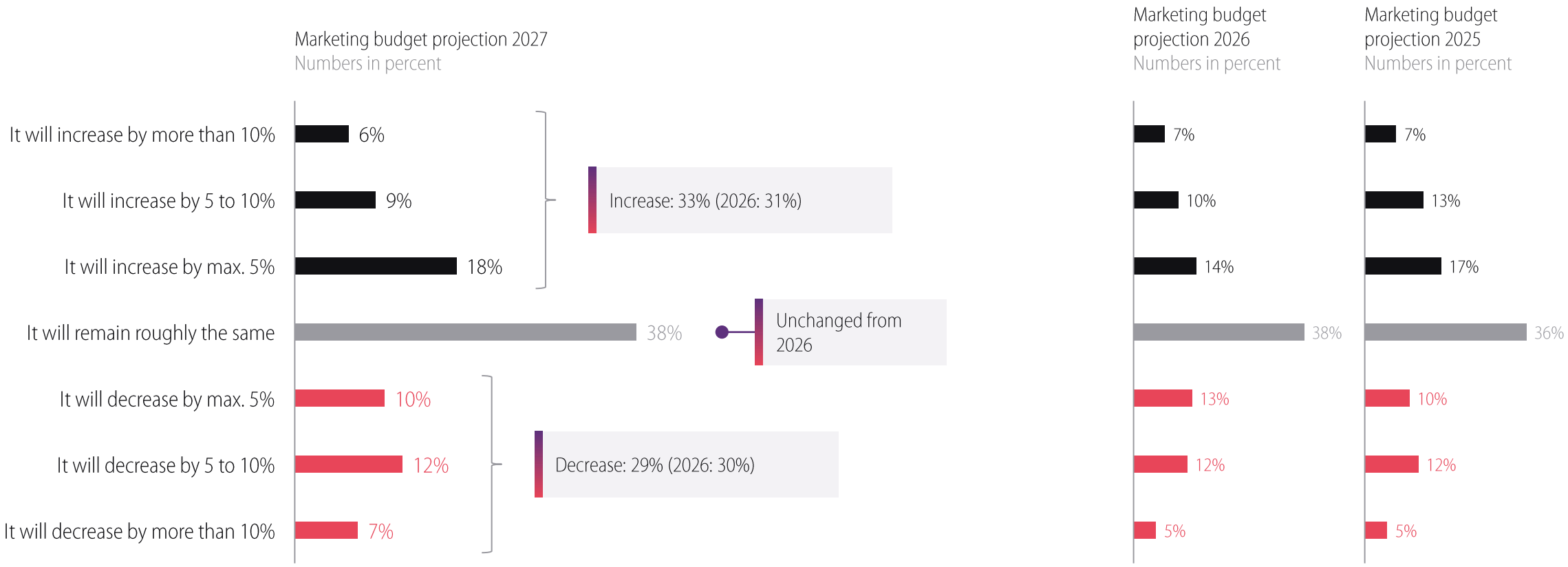
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CHAPTER 02

How will your marketing budget for 2027 develop?

SAME MOOD, SAME MONEY

Just like the outlook, budgets barely move – the largest group expects no change, as in 2026.



Question: How will your marketing budget for 2027 (marketing investments and expenditure) develop? Base: N = 655

EUROPE SPENDS WITH VARYING CONFIDENCE

Switzerland, Spain, France* and Italy plan more increases, BELUX cuts back – the rest stay on course.

AT
More expect their budgets to reamin unchanged

BELUX
Half expect cuts (51% vs. 38%), in line with the outlook

CH, ES, FR
More plan increases than in 2026

PL
Highest budget growth (55%) despite a mixed economic outlook

Marketing budget projection 2027 (sorted by country)
Numbers in percent

	DE (n=134)		AT (n=47)		IT (n=72)		BELUX (n=43)		NE (n=49)		ES (n=41)		FR (n=18*)		CH (n=88)		UK (n=33)		ME (n=55)		NORD (n=26*)		PL (n=49)		Overall (n=655)	
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It will increase	30%	28%	17%	13%	45%	49%	24%	16%	41%	39%	16%	29%	19%	33%	22%	31%	43%	33%	43%	42%	32%	35%	N.A.	55%	32%	33%
It will remain the same	39%	39%	33%	49%	23%	29%	38%	33%	37%	41%	55%	41%	53%	33%	46%	43%	28%	36%	30%	36%	32%	35%	N.A.	29%	38%	38%
It will decrease	31%	34%	50%	38%	32%	22%	38%	51%	21%	20%	29%	29%	28%	33%	32%	26%	30%	30%	27%	22%	37%	31%	N.A.	16%	30%	29%

Question: How will your marketing budget for 2027 (marketing investments and expenditure) develop? Base: N = 655
Note: Colour highlights based on comparison with 2026 and to indicate the highest / lowest values. Smaller samples (n<30) are marked with an asterisk (*) and their findings should be treated as tendencies only.



"The demands on marketing are rising: delivering more with fewer people but also having a stronger impact on revenue. REVENUE CONTRIBUTION is the keyword."

FLORIAN SCHLAPBACH
Chief Marketing Officer, Swisscom B2B

CENTRAL FINDINGS ACROSS MARKETS

How will your marketing budget for 2027 develop?

01 **Poland and Italy lead**
Around half plan to increase their budget.

02 **Austria holds back**
Only 13% plan increases – but fewer cuts than in 2026 (38% vs. 50%).

03 **The UK cools**
A third plan increases, down from 43%.

04 **Same picture overall**
A third raise budgets, almost as many cut them – as in 2026.

05 **BELUX cuts most**
Half expect a lower budget, up from 38% in 2026.

06 **Budgets turn up in Switzerland and Spain**
More plan increases than in 2026.

07 **Germany**
Slightly more cuts than increases (34% vs. 28%).

NEW SECTORS IN THE FAST LANE

Retail and Automotive* back on the gas, Energy* hits the brakes when it comes to marketing budgets.

Automotive
Highest improvement of budget outlook with 2026.

Retail
Strong turnaround: 40% vs. 27%

IT & Telecommunication
Last year's leader slows down: 30% vs. 43%

Marketing budget projection 2027 (sorted by sector)
Numbers in percent

	Automobile industry (N=26*)		Banking & insurances (N=49)		Construction & building materials (N=21*)		Chemical industry (N=5*)		Services (N=62)		Energy (N=16*)		Retail (N=63)		IT & telecommuni-cations (N=46)		Consumer goods & food products (N=129)		Media (N=30)		Pharmaceutical / health (N=37)		Other (N=128)		Total (N=655)	
	'26	'27	'26	'27	'26	'27	'26	'27	'26	'27	'26	'27	'26	'27	'26	'27	'26	'27	'26	'27	'26	'27	'26	'27	'26	'27
It will increase	22%	46%	42%	45%	28%	43%	N.A.	20%	27%	26%	38%	25%	27%	40%	43%	30%	33%	38%	31%	30%	18%	27%	32%	32%	32%	33%
It will remain the same	30%	23%	32%	31%	52%	38%	N.A.	40%	45%	50%	19%	25%	41%	43%	36%	43%	33%	32%	37%	47%	65%	43%	37%	38%	38%	38%
It will decrease	48%	31%	25%	24%	21%	19%	N.A.	40%	27%	24%	44%	50%	32%	17%	21%	26%	34%	30%	33%	23%	18%	30%	31%	30%	30%	29%

Pharma & Health
Polarised: more increases and more cuts

Question: How will your marketing budget for 2027 (marketing investments and expenditure) develop? Base: N = 655
Note. Colour highlights based on comparison with 2026 and to indicate the highest / lowest values. Smaller samples (n<30) are marked with an asterisk (*) and their findings should be treated as tendencies only.

CENTRAL FINDINGS ACROSS SECTORS

How will your marketing budget for 2027 develop?

01 Automotive seems to invest more in marketing than any other sector – nearly one in two.

02 Retail turns around
40% plan increases, up from 27%.

03 Pharma & Health polarises
More increases and more cuts than in 2026.

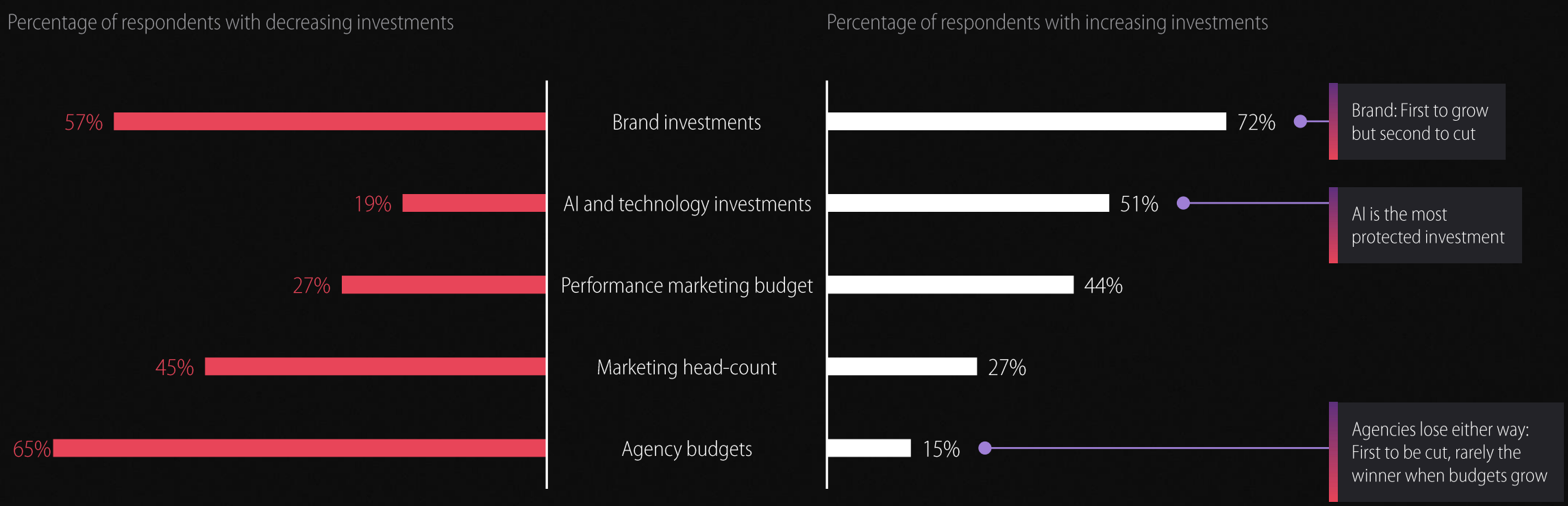
04 Banking, Retail and Consumer Goods all expect more increases than in 2026 – each now at 38% or more.

05 IT & Telecommunications falls back
Last year's leader, now 30% plan increases (2026: 43%).

06 Services and Media hold steady
Around half expect no change.

WHERE THE MONEY MOVES

CMOs explain their budget decisions: Less budget hits agencies or is used to grow headcount, while more funding flows into brand-building and AI, with AI proving the most resilient investment area.



Question: Please explain your budget decision. Base: N = 655

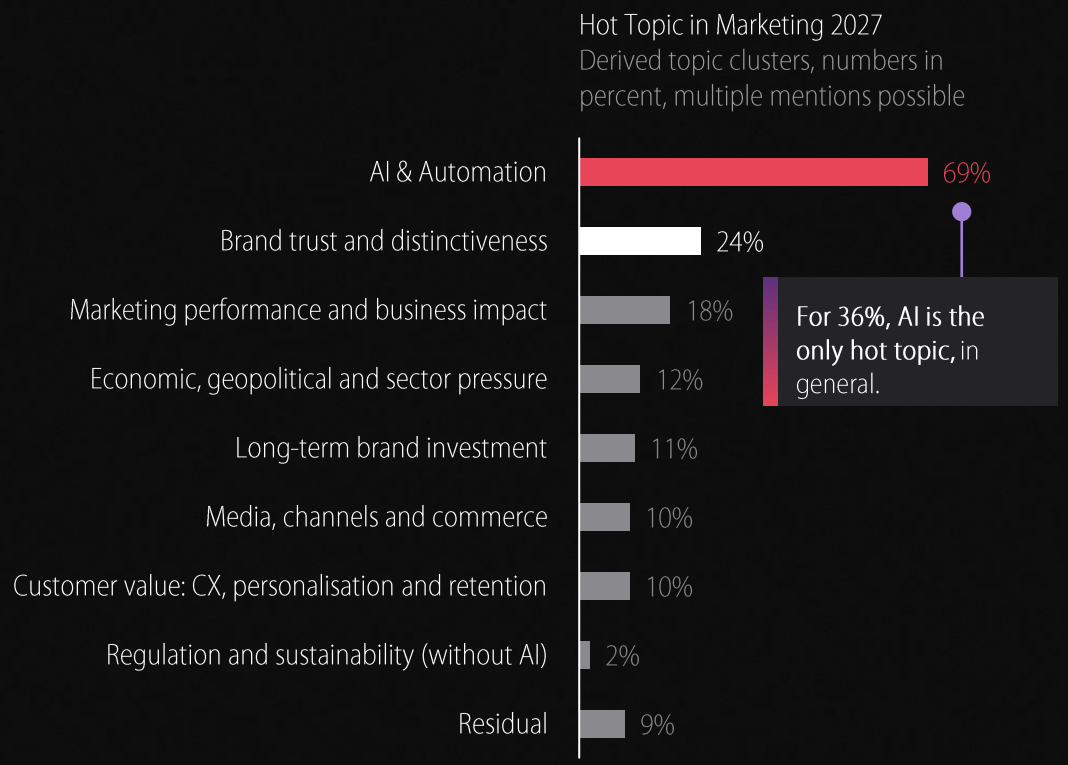
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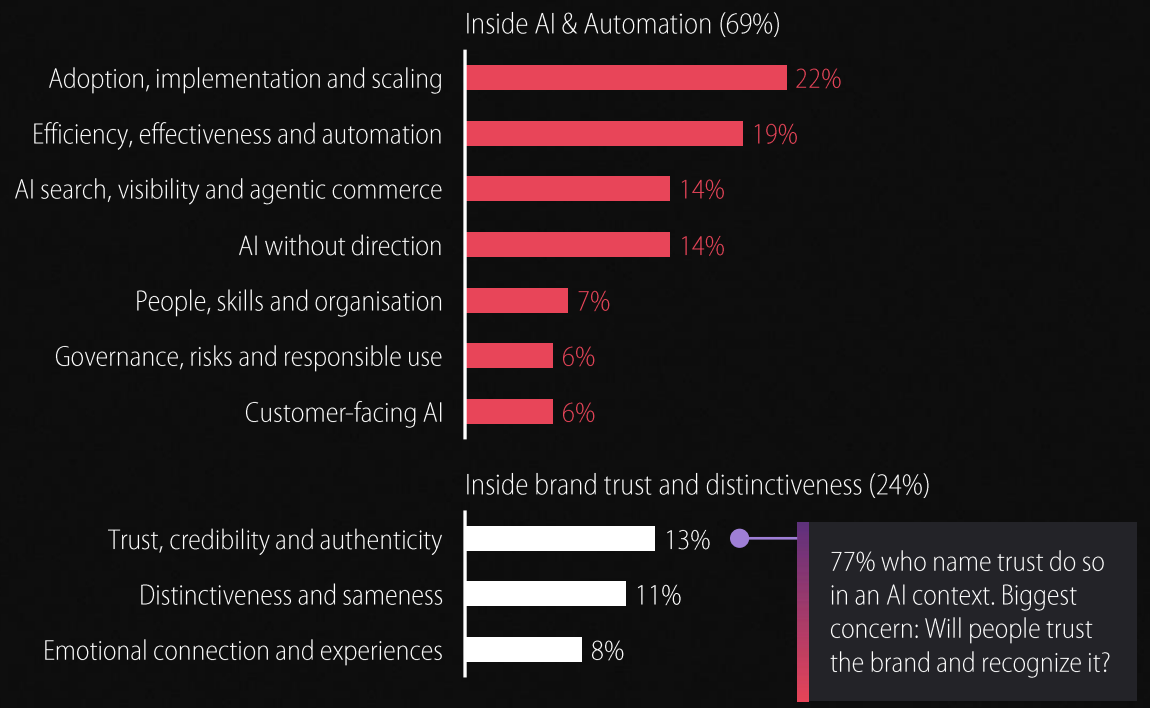
CHAPTER 03

In your opinion, what will be the hot topic of the marketing year 2027?

FROM HYPE TO HOMEWORK

CMOs want AI to work: adoption and efficiency lead. Brand trust comes second and is often linked to AI use.





Question: In your opinion, what is the hot topic for the marketing year of 2027? Base: N = 655

Subcategories overlap; persons counted once per main category.



"From Hype to Homework" – AI is here to stay and has become part of marketers' everyday reality in record time. The question is no longer whether we use AI, but what we use it for. More importantly, AI needs clear rules and, above all, people. Because TRUST ISN'T BUILT BY ALGORITHMS. It's built wherever people encounter and interact with brands. The responsibility for using AI thoughtfully therefore lies with both marketing leaders and publishers.

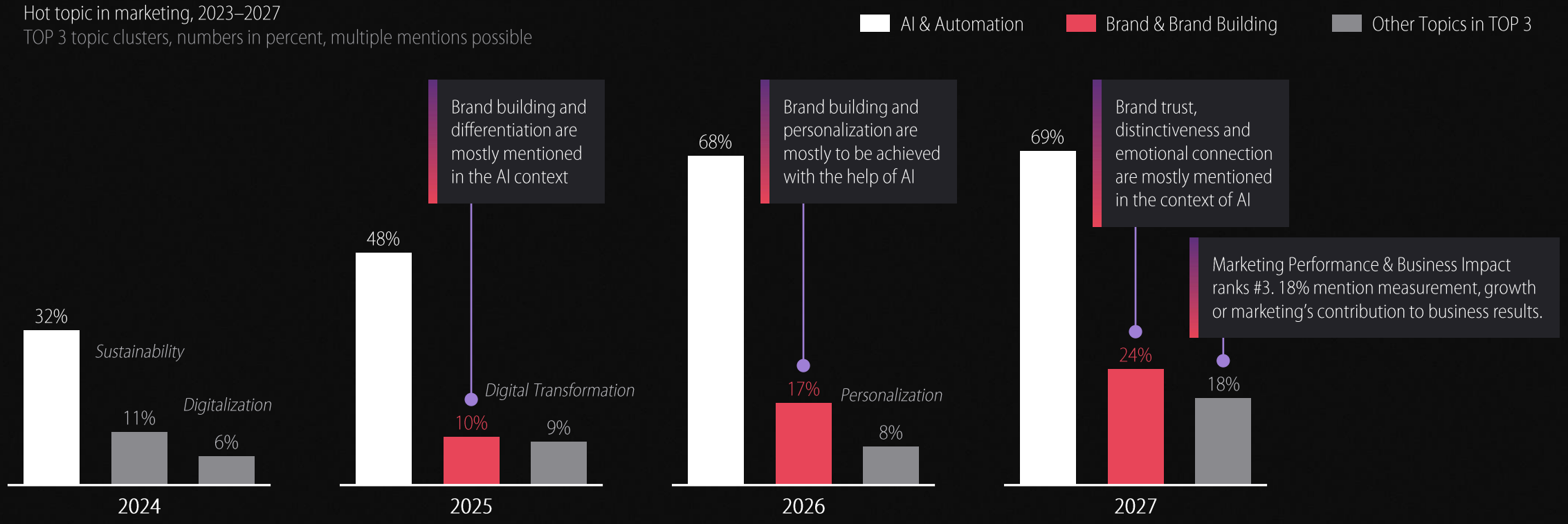
LENNART HARENDZA

Chief Revenue Officer & CEO Seven.One Media

SYSTEM UPDATE INSTALLED

AI remains firmly on top, but signs of maturity are emerging as marketing performance and business impact enter the top three for the first time.

Hot topic in marketing, 2023–2027
TOP 3 topic clusters, numbers in percent, multiple mentions possible



Question: In your opinion, what is the hot topic for the marketing year of 2027? Base: N = 655



"The real CHALLENGE is [. . .] remaining UNMISTAKABLE, AUTHENTIC and above all CREDIBLE amid the AI flood."

MARIA COMOS-BIRMANNS

Head of Marketing and Communications, Kalaidos University of Applied Sciences Switzerland



"One of the hot marketing topics in 2027 could be how to leverage AI to improve efficiency without compromising DISTINCTIVENESS, CREATIVITY and TRUST. [. . .] The risk, however, is a market full of communication that is efficient but increasingly similar."

RAFFAELE ZEPPIERI

Marketing Director Italy & Iberia, Sony Interactive Entertainment

CHAPTER 4A

How important do you think the following marketing trends will be in 2027?

USING AI FIRST. THEN: BEING FOUND AND BEING LOVED

Third year at the top for AI – behind it, it is all about customers: being found, being loved and served well.

Marketing trends 2027
Average euro allocation (out of 100)

TOP 5 2027		Share allocating budget > 0 €	Compared to 2026
1	Use of AI in marketing processes	85%	→
2	Performance marketing (search engine optimization (SEO), search engine advertising (SEA), GEO, LLM visibility)	75%	NEW
3	Emotional brand building	71%	↑
4	Customer experience, personalization and improvement of the customer journey	71%	↓
5	Social media and commerce	68%	NEW

85% give AI part of their budget – more than any other topic.

Performance marketing, now incl. GEO and LLM visibility, enters the top 5 at No. 2.

Social media and commerce is a new entry in the top 5. Controlling has dropped out of the top 5.

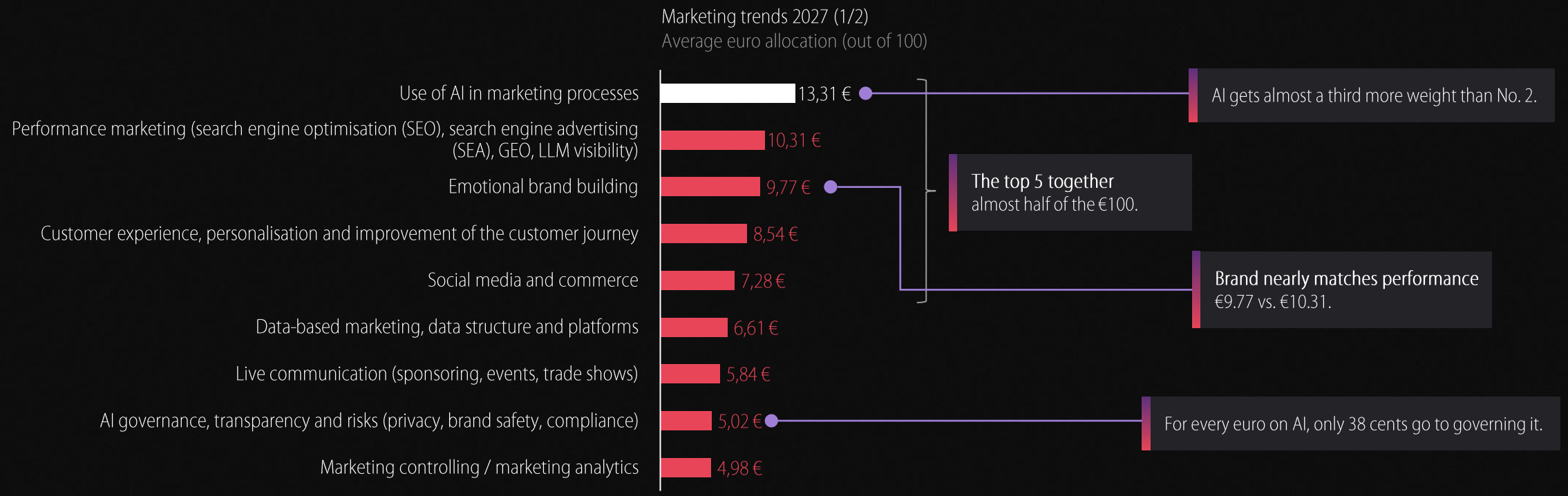
TOP 5 2026		Top2
1	Use of AI in marketing processes	87%
2	Customer experience, personalization & customer journey	83%
3	Data-based marketing	80%
4	Marketing ROI / marketing controlling / marketing analytics	78%
5	Emotional brand building	77%

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%

Question: How important do you think the following marketing trends will be in 2027? Allocate 100 euros to the issues that you think matter most, giving each one a weighting that reflects its value to you. Base: N = 655
Note: Numbers show the average amount (out of 100 euros) allocated to each topic; percentages show the share of respondents allocating more than €0 to a topic. Ranks compared with 2026. 2025/2026: top-2 box on a rating scale; 2027: allocation of 100 euros. Values are therefore not directly comparable.

FULL SPEED, FEW GUARDRAILS

The euros go into making marketing work –
less into governing AI and proving impact.



Question: How important do you think the following marketing trends will be in 2027? Allocate 100 euros to the issues that you think matter most, giving each one a weighting that reflects its value to you. Base: N = 655
Note: Numbers show the average amount (out of 100 euros) allocated to each topic.



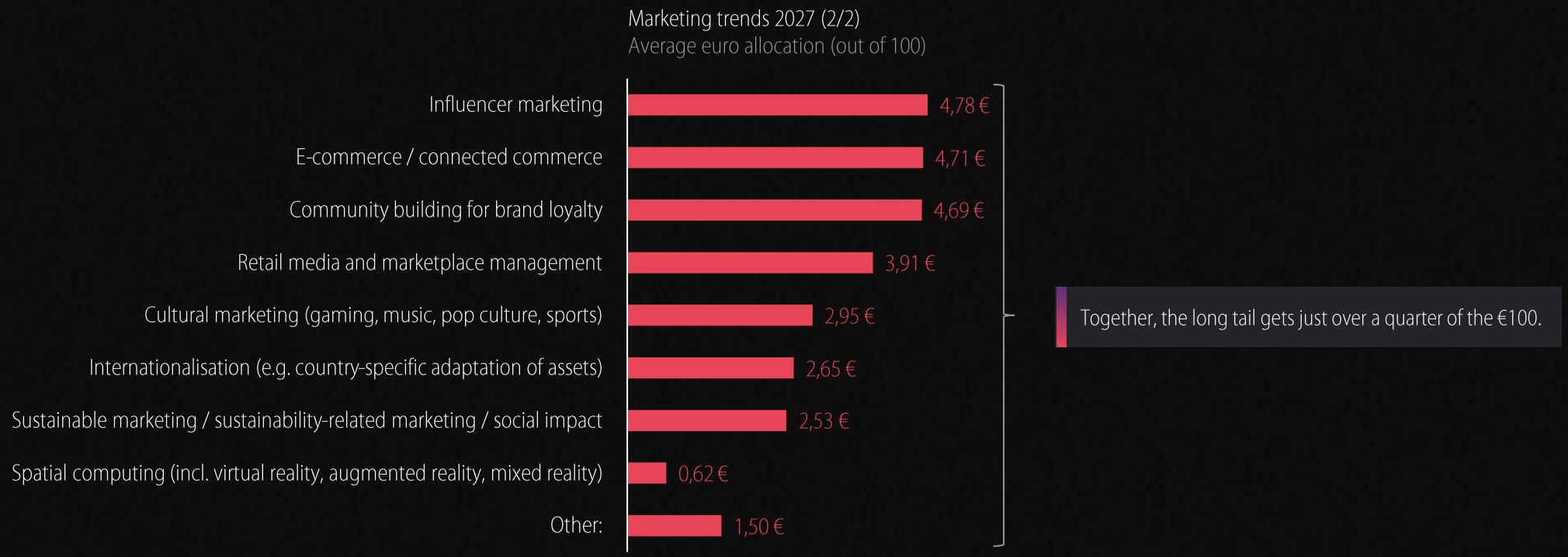
"Especially in times of economic uncertainty, brands need a clear sense of direction. The fact that marketing strategy and brand management rank among the most important team capabilities sends a strong signal. SUSTAINABLE GROWTH COMES FROM BALANCING SHORT-TERM IMPACT WITH LONG-TERM TRUST-BUILDING, grounded in a deep understanding of our audiences and the courage to develop creative ideas that resonate with them."

SELENA GABAT

Director International Consumer Marketing, LinkedIn

THE LONG TAIL GOES HUNGRY

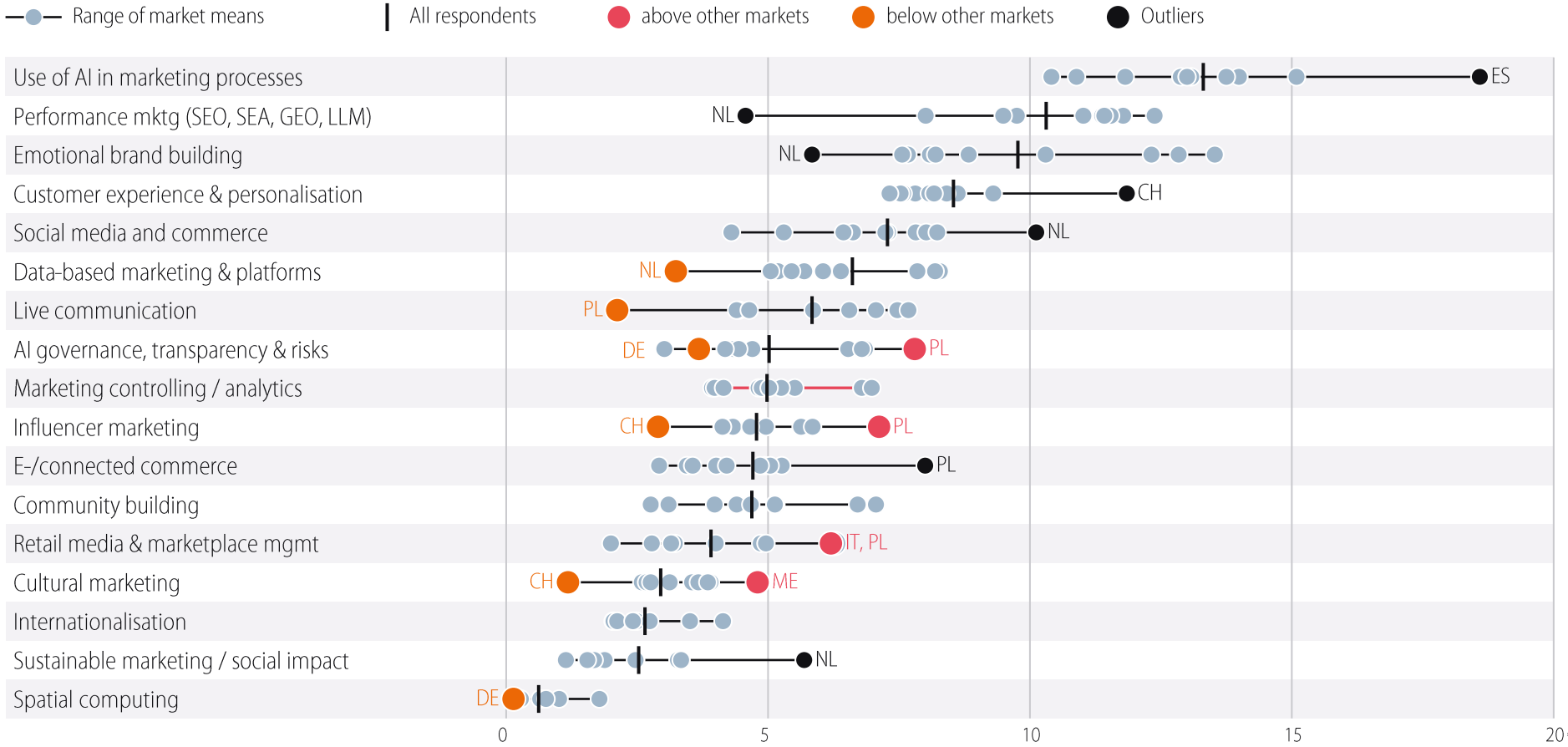
Many topics, little weight – sustainability and spatial computing are left on the sidelines.



Question: How important do you think the following marketing trends will be in 2027? Allocate 100 euros to the issues that you think matter most, giving each one a weighting that reflects its value to you. Base: N = 655
Note: Numbers show the average amount (out of 100 euros) allocated to each topic.

MARKETS DIFFER IN THE SMALLER Q4 TOPICS, NOT IN AI

Mean allocation of 100 € per marketing trend 2027, by market



27%

of NL respondents put all 100 € on a single item (13 of 49). All other markets: 0 to 2%.

"Allocate 100 euros", n = 655; blank = 0 €. Dots: markets with n > 30 (DE, CH, IT, ME, NL, PL, AT, BE, ES, UK); FR (n = 18), Nordics (n = 26) and "Other" not shown.
Mann-Whitney U, market vs. other markets with n > 30, Holm-corrected per item, $p < 0.05$, also stable without the 17 respondents who put 100 € on one item.

WHAT REALLY DIFFERS

Markets agree on AI, brand and social commerce – they differ on governance, retail media, influencer and cultural marketing.

Germany sits below the other markets on AI governance, sustainability and spatial computing.

Poland stands out most: above the other markets on AI governance, influencer marketing, retail media and e-commerce.

Marketing trends 2027: Where markets differ

Significantly above or below the other markets, based on the average euro allocation (out of 100)

	CH	NL	IT	DE	ME	PL
Above other markets	Customer experience	–	Retail media	–	Cultural marketing	AI governance, influencer marketing, retail media, e-commerce
Below other markets	Influencer marketing, cultural marketing	Performance marketing, data-based marketing	–	AI governance, sustainability, spatial computing	–	Live communication

No market stands out on: use of AI, emotional brand building, social media and commerce, marketing controlling, community building, internationalisation.
Austria, BELUX, Spain and the UK show no significant deviation at all.

Question: How important do you think the following marketing trends will be in 2027? Allocate 100 euros to the issues that you think matter most, giving each one a weighting that reflects its value to you. Base: N = 655
Note: Markets with n > 30; Mann-Whitney U, market vs. other markets, Holm-corrected per topic, $p < 0.05$.

AI EVERYWHERE? ALMOST.

Where AI doesn't lead, brand building or performance marketing does.

In 10 of 12 markets, AI ranks first or second – only in Austria and France does it fall further back.

BELUX and Austria expect the toughest year – and weight brand building above AI.

Marketing trends 2027: Highest ranks sorted by the average euro allocation (out of 100) 1/2
Average euro allocation (out of 100)

	DE (n=134)	CH (n=88)	NE (n=49)	ES (n=41)	IT (n=72)	UK (n=33)	ME (n=55)	NORD (n=26*)	PL (n=49)	FR (n=18*)	AT (n=47)	BELUX (n=43)	Overall (n=655)
Use of AI in marketing processes	13.99€	12.88€	13.08€	18.59€	11.82€	15.09€	13.75€	17.65€	10.41€	8.89€	10.89€	13.00€	13.31€
Performance marketing (search engine optimisation (SEO), search engine advertising (SEA), GEO, LLM visibility)	9.75€	11.38€	4.57€	11.54€	8.01€	11.42€	9.49€	16.42€	11.78€	11.89€	12.38€	11.02€	10.31€
Emotional brand building	12.84€	8.09€	5.84€	7.56€	8.83€	10.30€	8.20€	7.77€	7.67€	11.56€	12.32€	13.53€	9.77€
Customer experience, personalisation and improvement of the customer journey	7.81€	11.85€	8.41€	7.32€	7.58€	9.30€	8.62€	10.46€	8.08€	4.94€	8.17€	7.53€	8.54€
Social media and commerce	7.82€	6.63€	10.12€	7.24€	7.29€	4.30€	6.44€	4.73€	8.02€	10.61€	8.23€	5.30€	7.28€
Data-based marketing, data structure and platforms	8.28€	8.19€	3.24€	5.05€	5.19€	5.45€	5.69€	9.35€	6.39€	4.33€	7.85€	6.05€	6.61€
Live communication (sponsoring, events, trade shows)	5.86€	7.47€	6.55€	7.68€	7.06€	4.64€	4.45€	2.54€	2.12€	7.22€	7.47€	4.40€	5.84€
AI governance, transparency and risks (privacy, brand safety, compliance)	3.68€	4.70€	4.35€	4.44€	6.85€	4.18€	6.53€	5.15€	7.80€	2.61€	3.02€	6.79€	5.02€
Marketing controlling / marketing analytics	3.93€	5.51€	4.82€	6.98€	6.79€	4.15€	5.25€	4.12€	4.88€	3.72€	3.98€	5.02€	4.98€

Question: How important do you think the following marketing trends will be in 2027? Allocate 100 euros to the issues that you think matter most, giving each one a weighting that reflects its value to you. Base: N = 655
Note: Smaller samples (n<30) are marked with an asterisk (*) and their findings should be treated as tendencies only.



"Anyone who believes AI is only transforming the technology behind marketing and sales is underestimating its disruptive force. The truly profound revolution is still ahead, as companies face a fundamental CULTURAL and ORGANIZATIONAL TRANSFORMATION."

PROF. DR. SVEN REINECKE

Executive Director University of St. Gallen Institute for Marketing & Customer Insight

SMALL TOPICS, BIG LOCAL DIFFERENCES

In the long tail, single markets set clear accents – one priority list doesn't fit every market.

Middle East
1.6 times the average for cultural marketing.

Poland
€8 of €100 for e-commerce – 1.7 times the average.

Marketing trends 2027: Highest ranks sorted by the average euro allocation (out of 100) 2/2
Average euro allocation (out of 100)

	DE (n=134)	AT (n=47)	CH (n=88)	BELUX (n=43)	NE (n=49)	ES (n=41)	ME (n=55)	IT (n=72)	UK (n=33)	FR (n=18*)	NORD (n=26*)	PL (n=49)	Overall (n=655)
Influencer marketing	4.90€	4.13€	2.90€	5.63€	4.33€	4.66€	4.96€	4.13€	5.85€	8.89€	4.08€	7.12€	4.78€
E-commerce / social commerce / connected commerce	4.93€	3.45€	5.26€	4.21€	2.92€	3.56€	5.04€	4.01€	4.85€	3.06€	5.92€	8.00€	4.71€
Community building for brand loyalty	5.13€	5.13€	4.40€	4.67€	2.76€	3.10€	6.71€	5.15€	7.06€	3.44€	2.54€	3.98€	4.69€
Retail media and marketplace management	2.78€	4.96€	3.16€	4.00€	4.86€	3.15€	3.22€	6.26€	2.00€	3.94€	2.69€	6.20€	3.91€
Cultural marketing (gaming, music, pop culture, sports)	2.59€	2.68€	1.18€	3.12€	3.55€	2.76€	4.80€	3.90€	3.85€	3.61€	0.69€	3.67€	2.95€
Internationalisation (e.g. country-specific adaptation of assets)	2.43€	2.74€	2.47€	2.05€	4.14€	2.12€	2.49€	3.51€	2.42€	2.33€	2.77€	2.04€	2.65€
Sustainable marketing / sustainability-related marketing / social impact	1.86€	1.68€	1.88€	3.28€	5.69€	3.34€	2.47€	2.47€	1.55€	6.72€	2.62€	1.14€	2.53€
Spatial computing (incl. virtual reality, augmented reality, mixed reality)	0.14€	0.26€	0.76€	0.28€	1.78€	0.76€	0.75€	1.01€	0.18€	1.39€	0.12€	0.65€	0.62€
Other	1.28€	0.66€	1.31€	0.12€	9.00€	0.17€	1.15€	0.11€	3.39€	0.83€	0.38€	0.04€	1.50€

Question: How important do you think the following marketing trends will be in 2027? Allocate 100 euros to the issues that you think matter most, giving each one a weighting that reflects its value to you. Base: N = 655
Note: Smaller samples (n<30) are marked with an asterisk (*) and their findings should be treated as tendencies only.

CHAPTER 4B

Focusing on AI, which marketing challenge would you most want AI to help you solve?

LET AI DO THE GRUNT WORK

AI is wanted as a workforce – but who takes care of brand trust and governance?



Question: Focusing on AI, which marketing challenge would you most want AI to help you solve? (Choose up to four) Base: N = 188 (AI budget ≥€20 in Q4)



"The biggest challenge will not be technology, budget or even skills. The biggest challenge will be keeping the BRAND DISTINCTIVE in a world where everyone has access to the same AI tools."

AGNIESZKA DURST

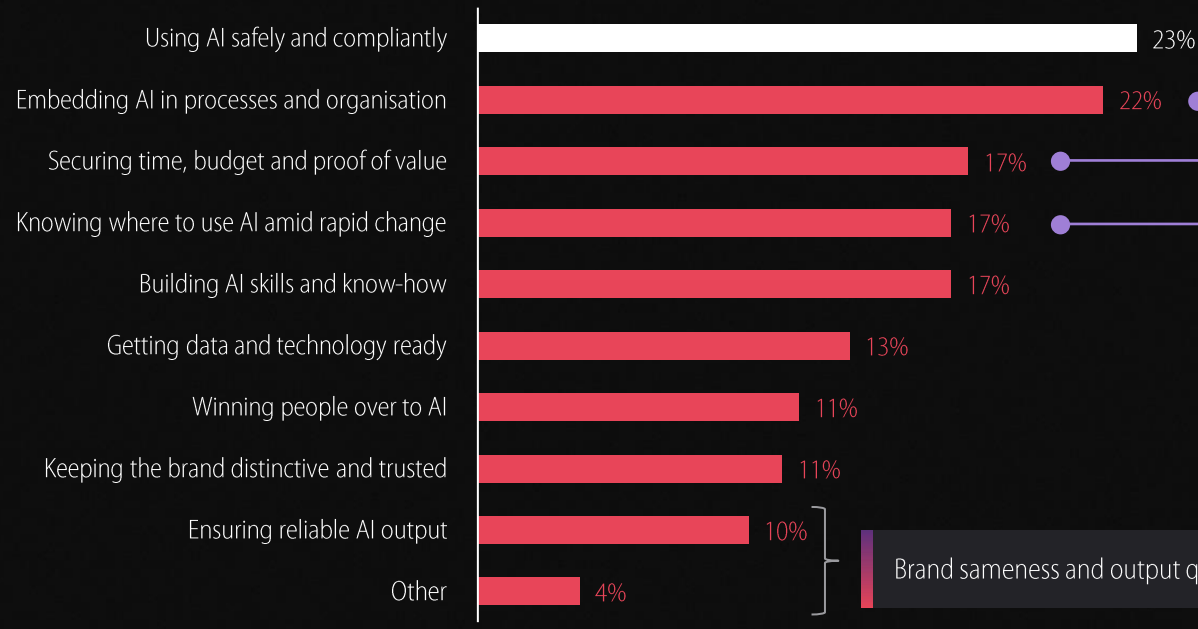
Director of the Brand Management, Communications & Community Engagement, UNIQA Polska

CHAPTER 4C

What is your biggest challenge in implementing or using AI in marketing?

THE BRAKE ISN'T THE TECH. IT'S THE ORGANIZATION.

AI slows down because of rules, processes and people – the organization has to catch up with the technology.



The barriers are human and organizational, not technical. The most commonly cited barriers are driven by skills and acceptance (28%), not technology (23%)*

Safe and compliant use tops the list – most often over data protection and privacy

Close behind embedding AI in processes – often slowed by friction with IT and internal approvals

Time and budget are named often equally

The pace of change creates uncertainty – from choosing use cases to keeping up with new tools

Brand sameness and output quality are minor concerns

Question: What is your biggest challenge in implementing or using AI in marketing? Base: N = 168 (respondents with an AI budget of at least €20 of 100 € in Q4).
Note: *Derived topic clusters from open answers. Human: Winning people over to AI (11%) + Building AI skills (17%) = 28% // Tech: Data and technology 13 % + Reliable AI output 10 % = 23 %.



"The challenge is ensuring DATA PROTECTION, COPYRIGHT, BRAND SAFETY and DATA QUALITY, while gaining efficiency without slipping into generic AI content and preserving creativity and brand identity."

CATHERINE NIEBUHR & NADINE BARTENSCHLAGER
Marketing Directors Germany, Beiersdorf



"TECHNOLOGY is moving quickly, but the harder transformation is organisational, and the most profound is HUMAN."

GEORGE YARYURA
Global Head of Wholesale Marketing Mashreqbank PSC



"Ensuring quality while raising the LEVEL OF KNOWLEDGE internally. Everyone needs to understand how we can use AI well and feel confident with the tools, not just a few people. At the same time, we need to keep HUMAN JUDGMENT and not use AI just because we can. It is about finding the right use cases and building a way of working where we actually get BETTER RESULTS."

SOFIA MALM
Head of Marketing, Besqab

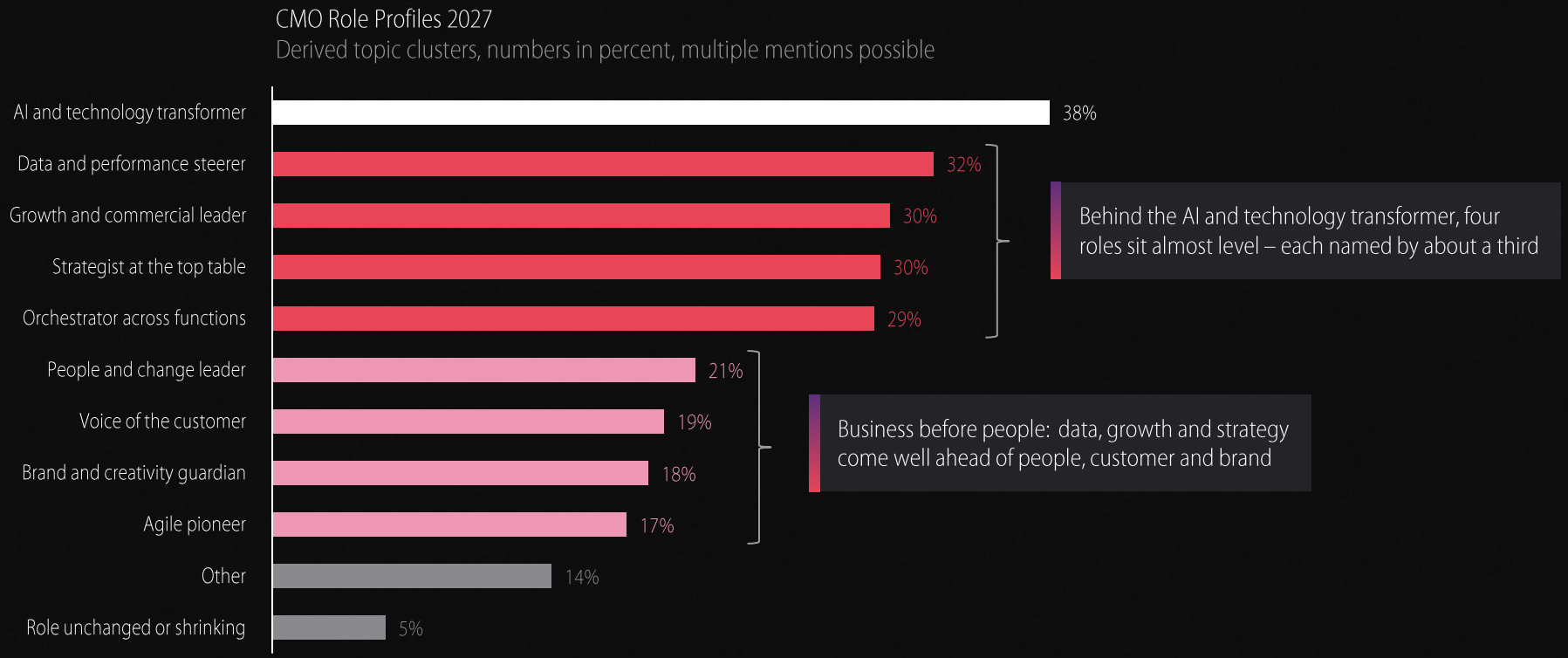
05

CHAPTER 05

What is the evolving role of the CMO within your organisation, and which capabilities and skills are essential to make the organisation fit for the future? Please explain your reasoning.

ONE CMO, MANY HATS.

CMOs treat AI as a skill to master and growth as the role to own.



Question: What is the evolving role of the CMO within your organisation, and which capabilities and skills are essential to make the organisation fit for the future? Base: N = 655
Note: Role profiles derived from open answers; role statements and skills combined; multiple mentions possible. AI and technology transformer: technology is what changes; people and change leader: leading people and organisational change.
Other: individual skills such as marketing craft, execution and human qualities and 49 respondents without a substantive answer.

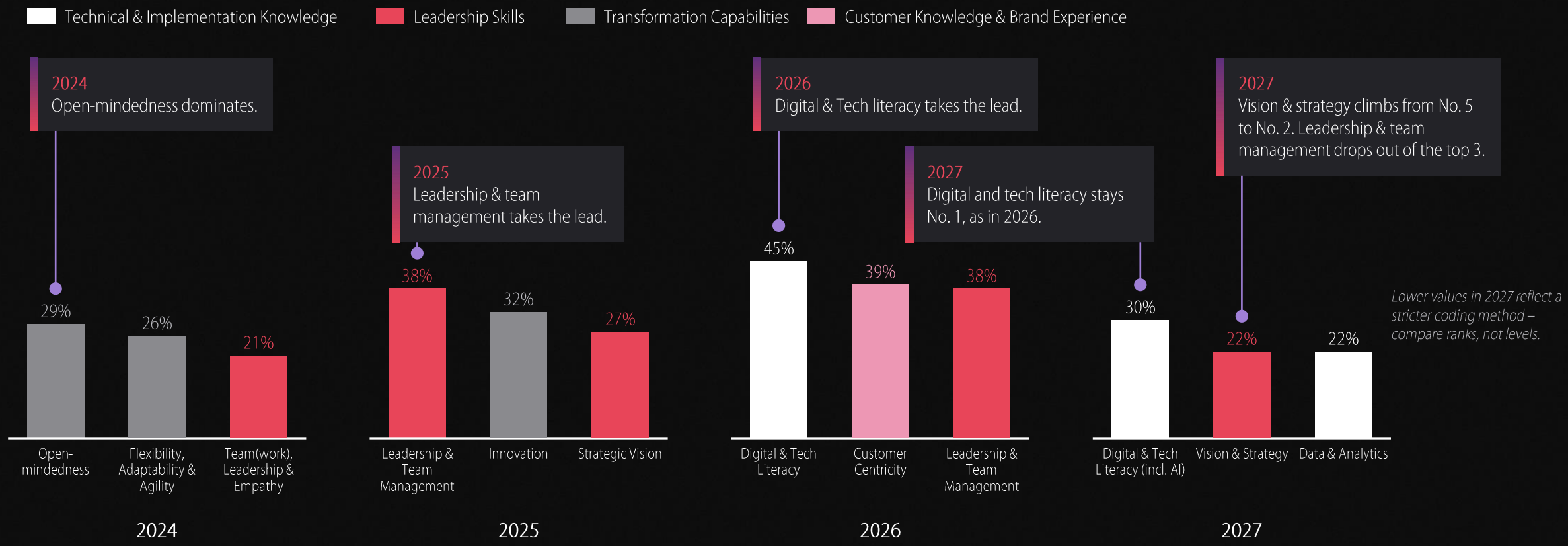


"CMOs are becoming Chief Complexity Officers. They must orchestrate the complex interplay of technology, data, touchpoints and people while simultaneously shaping their BRAND'S IDENTITY, BUILDING TRUST and DRIVING GROWTH."

YVONNE WICHT
Chairwoman CMO Council Serviceplan Group

MASTER THE MACHINE AND THE DATA. OWN THE STRATEGY.

The skill profile tilts from flexibility and leadership towards technology and strategy.



Question: What is the evolving role of the CMO within your organisation, and which capabilities and skills are essential to make the organisation fit for the future? Base: N = 655 Note: Top 5 skill topics per year derived from open answers, multiple mentions possible; 2027: skill statements only, no roles. Colours show the clusters used since 2024. Due to a new coding method in 2027, percentages are not directly comparable with earlier years, but ranks are.



"The CMO moves from owner of the marketing function to ARCHITECT OF THE GROWTH SYSTEM."

NELSON DISANTO

Managing Director Naos, Bioderma Institut Esthederm Etat Pur



"The CMO will be less of a storyteller [. . .] The CMO should be seen as an architect who is responsible for GROWTH, TECHNOLOGY and BRAND INTEGRITY."

SUSAN SCHRAMM
Chief Marketing Officer, Motel One

CHAPTER 06

Which specialist skills do your marketing teams need to develop in order to be successful?



"AI has moved from BUZZ to DAILY BUSINESS. CMOs must now turn this technology into growth while sharpening their brands' identity. When everyone has access to the same tools, efficiency alone no longer creates a competitive advantage."

FELIX BARTELS
CMO Serviceplan Group

AI LITERACY: THE NEW MUST-HAVE

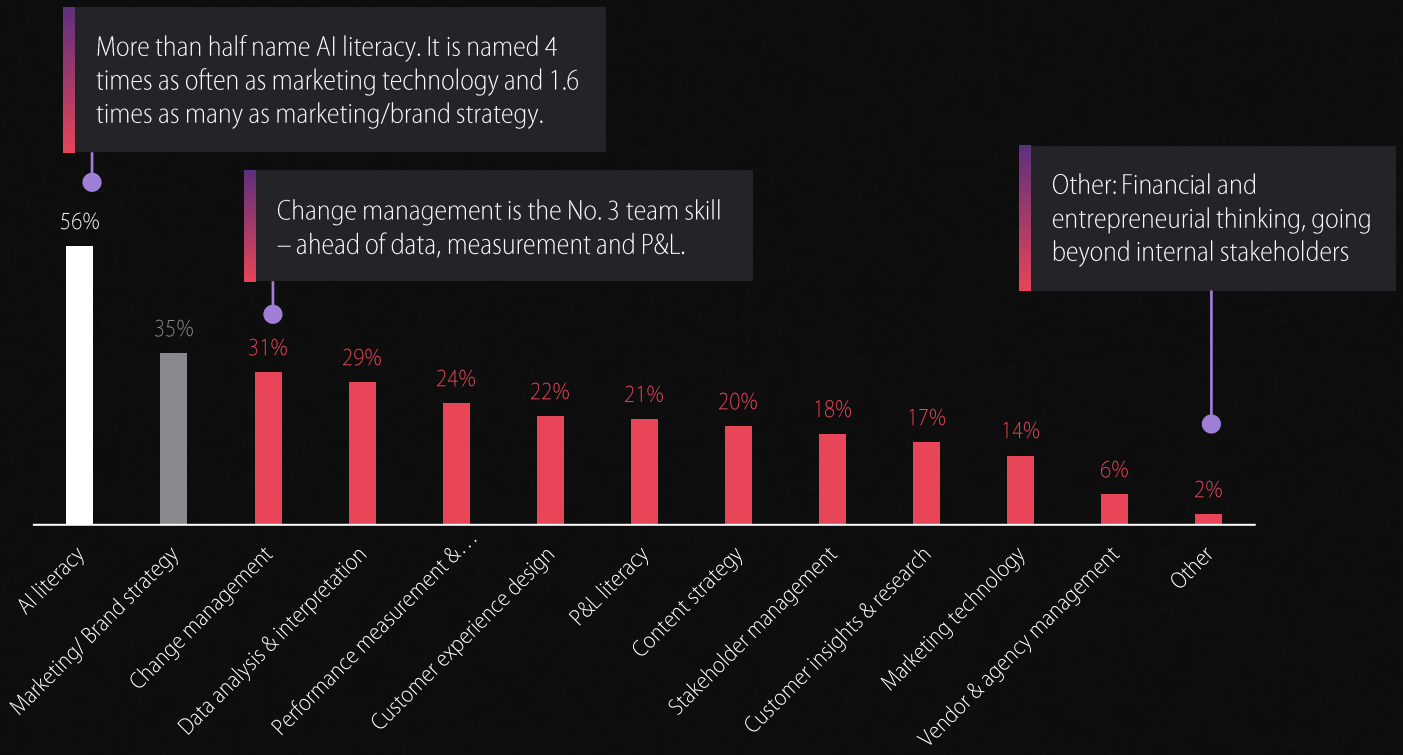
Using AI matters more than running the tech – brand and change complete the team's toolkit.

Specialist skills 2027
Numbers in percent, multiple mentions possible

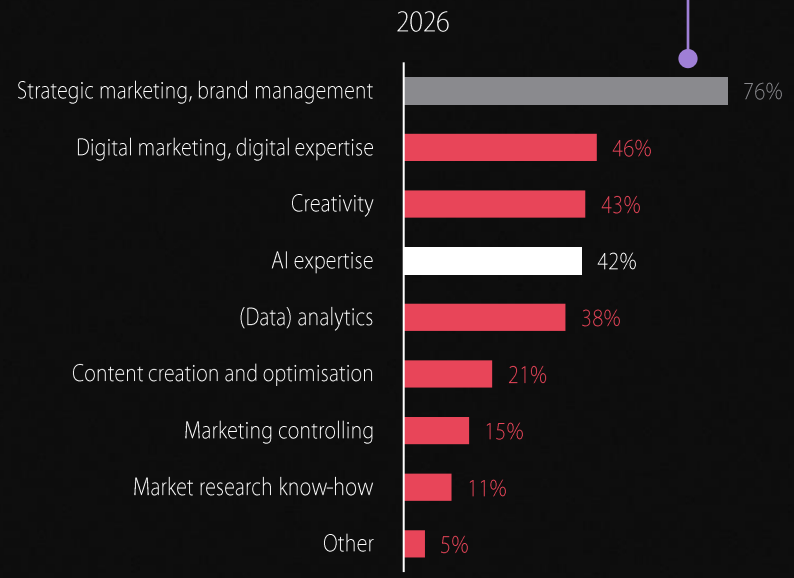
More than half name AI literacy. It is named 4 times as often as marketing technology and 1.6 times as many as marketing/brand strategy.

Change management is the No. 3 team skill – ahead of data, measurement and P&L.

Other: Financial and entrepreneurial thinking, going beyond internal stakeholders



Marketing and brand strategy remain important, but are no longer seen as the clear priority they were a year ago.



Question: Which specialist skills do your marketing teams need to develop in order to be successful? Please state your top three. Base: N = 655



"The CMO brief is changing. In our searches, boards no longer want "only" brand builders. They want commercial leaders. Top CMOs are measured on growth and hard KPIs, speak the language of the P&L and lead the entire organization through the AI transformation. **BUSINESS IMPACT IS ONE OF MARKETING'S TOP PRIORITIES.** That is the new benchmark for world-class marketing leadership."

SILVIA EGGENWEILER

Partner, Healthcare & Lifesciences / Consumer Markets, Heidrick & Struggles

THE ORGANISATION LAG – WHO LEADS THE TRANSFORMATION?

QUESTIONS 3-6: HOT TOPICS, TRENDS & CHALLENGES AI dominates the 2027 agenda but stalls on people more than on tech – CMOs claim tech and growth for themselves and want their teams to manage change.

01 AI gets the most weight of all trends – governing it just 38 cents per AI euro.

02 CMOs treat AI as a skill to master and growth as the role to own.

03 People and change leader
Named by only about one in five CMOs.

04 Nearly seven in ten name AI as a hot topic – only 7% the people, skills and organisation behind it.

05 For 36%, AI is the only hot topic.

06 Skills and acceptance are cited more often as AI hurdles (28%) than technology (23%).

07 Leading teams drops out of the top 5 CMO skills.

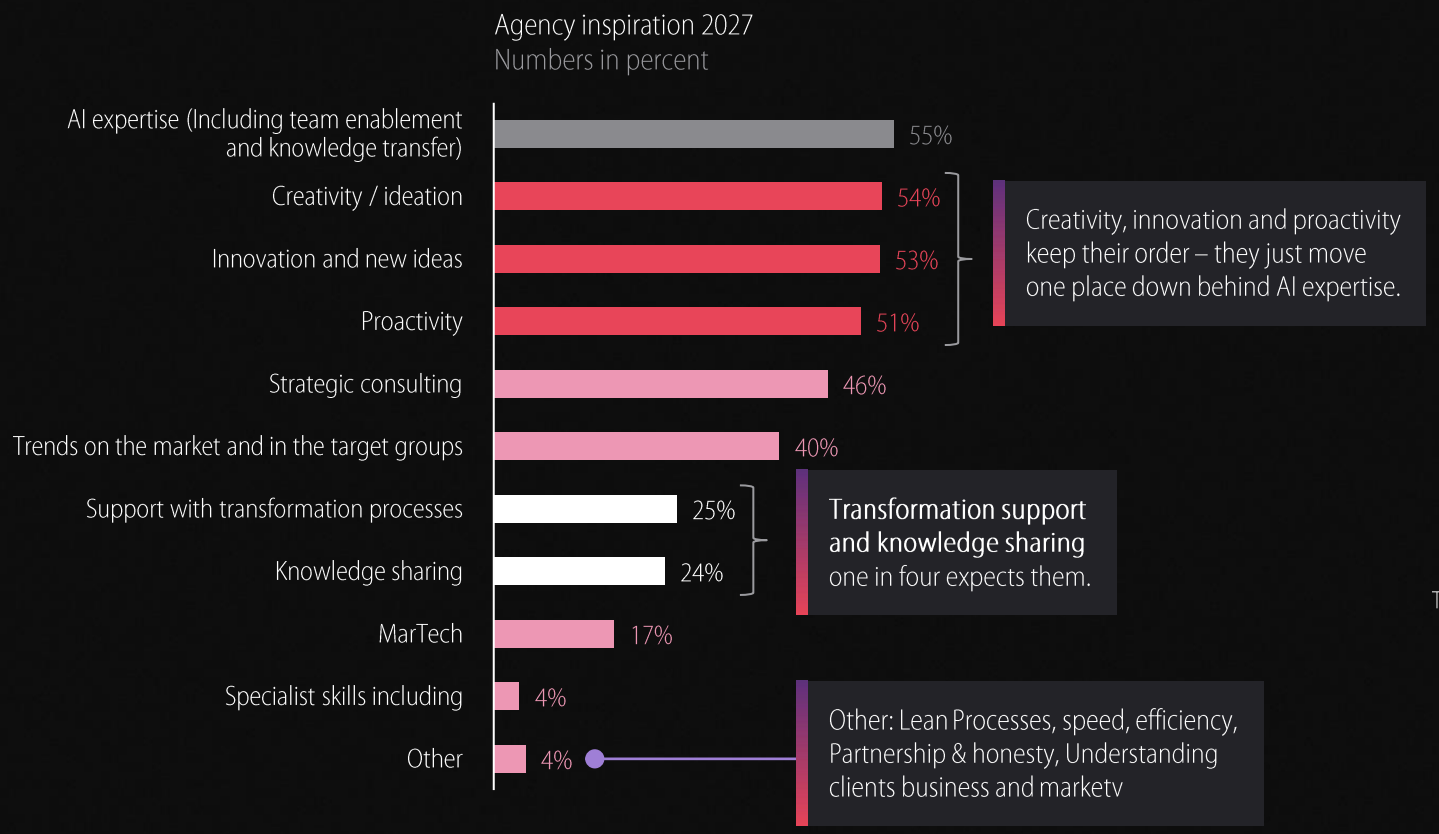
08 Change management
The No. 3 skill teams need to build.

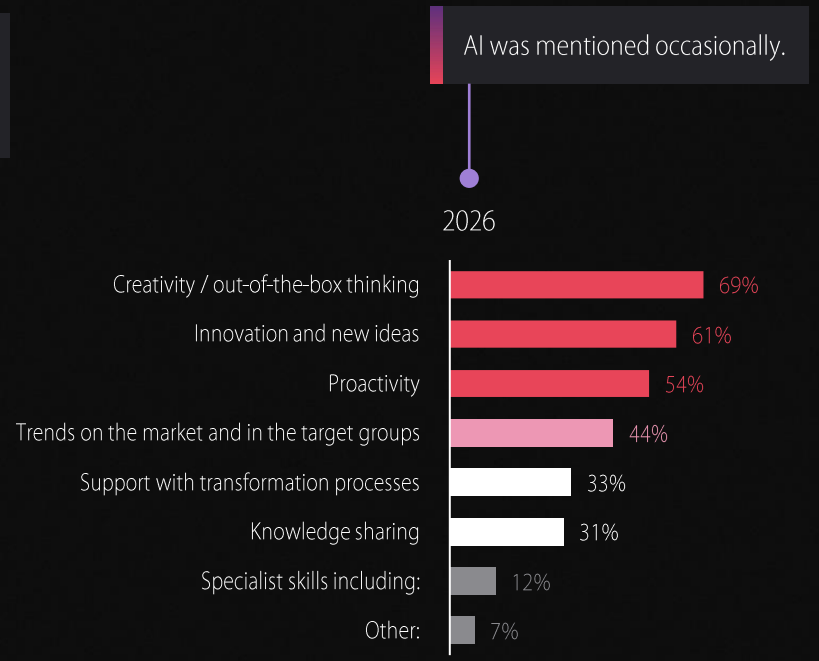
CHAPTER 07

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

BRING THE AI. KEEP THE SPARK.

CMOs want AI know-how and fresh ideas in equal measure – from partners who act before being asked.





Question: What do you expect from your agency partners in the future? Base: N = 655



"AI has arrived in marketing. Now the organization decides whether it creates impact. GOVERNANCE makes AI scalable, BRAND makes it trustworthy. Both need a CMO who credibly leads the change as the voice of the market and stops treating the brand as the flexible line in the budget."

JULIA ZIMMERMANN
Executive Partner, Future Marketing

ONE WISH LIST, FOUR DIFFERENT NO. 1S

What clients value first differs from market to market – agencies need to brief locally.

Austria asks for market and target-group trends far more often than any other market.

Middle East innovation and new ideas come first.

Proactivity is the top wish in Poland and Italy.

Agency inspiration 2027
Sorted by the highest / second highest value per market .
Numbers in percent.

	DE (n=134)	CH (n=88)	BELUX (n=43)	NE (n=49)	ES (n=41)	FR (n=18*)	UK (n=33)	AT (n=47)	NORD (n=26*)	ME (n=55)	IT (n=72)	PL (n=49)	Overall (n=655)
AI expertise, including team enablement and knowledge transfer	58%	57%	44%	33%	63%	44%	61%	57%	69%	62%	61%	47%	55%
Creativity / ideation	60%	51%	63%	41%	39%	61%	61%	55%	65%	56%	36%	67%	54%
Innovation and new ideas	57%	47%	58%	31%	56%	56%	52%	66%	62%	71%	49%	43%	53%
Proactivity	42%	38%	60%	24%	46%	50%	48%	53%	62%	67%	65%	76%	51%
Strategic consulting	43%	34%	60%	24%	54%	56%	45%	51%	46%	53%	54%	53%	46%
Trends on the market and in the target groups	34%	41%	44%	16%	46%	44%	27%	62%	42%	51%	33%	47%	40%
Support with transformation processes	28%	25%	12%	16%	32%	28%	33%	17%	31%	33%	31%	16%	25%
Knowledge sharing	15%	19%	28%	18%	20%	39%	27%	32%	42%	31%	18%	35%	24%
MarTech	25%	16%	12%	10%	15%	11%	9%	15%	23%	18%	7%	27%	17%
Specialist skills including:	5%	3%	0%	0%	5%	6%	9%	2%	4%	5%	1%	2%	4%
Other:	3%	5%	2%	12%	2%	6%	6%	0%	8%	2%	4%	8%	4%

Question: What do you expect from your agency partners in the future? Multiple mentions possible. Base: N = 655
Note: The highest and second-highest values are highlighted in different colours.Smaller samples (n<30) are marked with an asterisk (*) and their findings should be treated as tendencies only.

CENTRAL FINDINGS ACROSS MARKETS

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

01 Innovation and new ideas lead in Austria and the Middle East.

02 Austria asks for market and target-group trends far more often than other markets.

03 AI expertise comes first in Switzerland and Spain – and ties with creativity in the UK.

04 Creativity comes first in Germany, BELUX and the Netherlands – but only 36% ask for it in Italy.

05 Poland puts proactivity first
Three in four expect it, more than in any other market.

06 In no market does more than a third expect support with transformation.

ABOUT THE CMO BAROMETER

Serviceplan Group's annual international study exploring the key priorities and challenges shaping the CMO agenda.

16
COUNTRIES

655
CMOS

Bringing together the perspectives of marketing leaders across Europe and Middle East providing cross-market view of the developments transforming marketing and the role of the CMO. The study is conducted in collaboration with the University of St.Gallen (HSG), Heidrick & Struggles, Seven.One Media and LinkedIn.

CMO BAROMETER

IN COOPERATION WITH

SERVICEPLAN GROUP HOUSE OF COMMUNICATION

University of St.Gallen
Institute for Marketing and Customer Insight

HEIDRICK & STRUGGLES

seven.one MEDIA

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THANK YOU!

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