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Press release

Mind the Gap!

International CMO Barometer 2027: After the AI hype comes the reality check.

AI dominates the CMO agenda, but the decisive transformation is now taking place beyond the technology itself: in brand, governance, organisation and the demonstration of business impact. Technological capabilities are often advancing faster than organisations' ability to embed them effectively in marketing. The new CMO Barometer 2027 reveals where ambition and reality diverge, and why brands in particular are regaining importance in the age of AI. A total of 655 marketing decision-makers from 16 countries shared their priorities, expectations and budget plans. The international study by the Serviceplan Group was conducted in collaboration with the University of St. Gallen (HSG), Heidrick & Struggles, Seven.One Media and LinkedIn.

Munich, 25 November 2026 — Rarely has marketing had to navigate so many changes at once: technological leaps, economic pressure, evolving consumer expectations and the question of how brands can remain relevant and distinctive in an increasingly AI-driven world. CMOs occupy a critical position at this intersection. They must translate technological opportunities into practical applications, stay close to markets and customers, and at the same time demonstrate marketing's contribution to business success. Their agenda reflects this, with implications that extend far beyond marketing.

For the eighth time, the Serviceplan Group, together with the University of St. Gallen (HSG), Heidrick & Struggles, Seven.One Media and LinkedIn, has surveyed leading CMOs across Europe and the Middle East about their expectations for the year ahead. The latest CMO Barometer 2027 provides a unique, evidence-based snapshot of the marketing industry. It shows which factors will determine success and relevance in an AI-driven future, and where ambition and reality still diverge.

The key findings of the latest study, conducted in 16 countries in September this year:

- The majority of CMOs expect the economic climate to remain stable (50%) and marketing budgets to stay unchanged. Unlike last year, however, the trend is once again moving towards optimism, albeit only slightly.

- **AI remains the defining topic for 2027 (69%) and now shapes the entire marketing agenda. At the same time, the brand is making a comeback: brand trust and differentiation are gaining importance (24%).**
- The CMO profile is becoming more technical and business-focused: CMOs see themselves as AI and technology transformers (38%) and as growth and business drivers (32%), and less as people and change leaders.

Florian Haller, CEO of the Serviceplan Group: "AI remains the defining topic in marketing, but the hype is giving way to a clearer view of what actually works and creates value. This is also changing the role of the CMO: they must bring together technology, data, growth, brand and business. And precisely because AI can do more and more, the brand is becoming more important. When everyone has access to similar technologies, differentiation does not come from the tool, but from ideas, conviction and human judgement."

Stable overall sentiment, but Germany remains sceptical

After years of uncertainty, the low point appears to have been reached: 23% expect the economic situation to improve in 2027, up from 20% last year. Marketing budgets are also showing a cautious upward trend, with 33% expecting budgets to increase, compared with 30% for 2026. However, this cannot yet be described as a genuine upswing. Most respondents still expect the economic situation (50%) and budgets (38%) to remain unchanged, although the differences between markets are significant.

This is particularly evident in Germany, where 31% expect the economic situation to deteriorate, while only 15% anticipate an improvement. Caution also prevails when it comes to marketing budgets: 34% expect budgets to decrease, compared with 28% who expect them to rise. The outlook is considerably more optimistic in the Middle East, where 53% expect the economic situation to improve.

Florian Schlapbach, Chief Marketing Officer, Swisscom B2B: "The demands on marketing are rising: delivering more with fewer people but also having a stronger impact on revenue. REVENUE CONTRIBUTION is the keyword."

AI comes of age: from experimentation to an organizational test

AI is and remains THE top priority: since 2024, the share of marketing leaders placing AI at the top of their agenda has more than doubled, from 32% to 69%. The increase compared with last year is small, however (2026: 68%). This plateau signals maturity. AI has moved from experimentation to a business imperative. The decisive question now is how companies integrate the technology into their ways of working, decision-making processes and capabilities.

The biggest barriers to implementing AI are human and organisational. Among respondents with a relevant AI budget, 23% cite secure and compliant use as the greatest challenge, 22% point to integration into processes and the organisation, and 17% name securing time, budget and measurable results. Even so, significantly more budget is allocated to using AI than to governing it: for every euro spent on AI applications, only 38 cents are currently spent on governance.

Sofia Malm, Head of Marketing, Besqab: “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.”

George Yaryura, Global Head of Wholesale Marketing, Mashreqbank PSC: “Technology is moving quickly, but the harder transformation is organisational, and the most profound is human.”

Catherine Niebuhr & Nadine Bartenschlager, Marketing Directors Germany, Beiersdorf: “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.

Prof. Dr. Sven Reinecke, Executive Director, University of St. Gallen (HSG): “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.”

Brand is back, but remains a flexible budget item

The brand is clearly regaining relevance. Twenty-four per cent of CMOs cite brand trust and differentiation as a top priority, the second-highest figure after AI. Seventy-seven per cent see a direct connection between trust and AI. In a world where content, services and customer experiences are increasingly created automatically, the brand becomes an anchor for orientation and a source of differentiation.

This is also reflected in budget plans. When marketing budgets increase, 72% intend to invest in the brand. Brand investment therefore ranks first, ahead of investment in AI and technology (51%). At the same time, when budgets decline, 57% would cut brand investment.

Maria Comos-Birmanns, Head of Marketing and Communications, Kalaidos University of Applied Sciences Switzerland: “The real challenge is […] remaining unmistakable, authentic and above all credible amid the AI flood.”

Agnieszka Durst, Director Brand Management, Communications & Community Engagement, UNIQA Polska: "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."

Lennart Harendza, Chief Revenue Officer & CEO, Seven.One Media: "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 build 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."

Julia Zimmermann, Executive Partner, Future Marketing Management Consultant: "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."

The new CMO profile: technology, growth and orchestration

The CMO role is shifting further towards technology and business management. Thirty-eight per cent describe themselves as AI and technology transformers, and 32% as growth and business drivers. Thirty per cent respectively see data and performance management and strategic leadership as defining responsibilities, while 29% cite cross-functional orchestration. People and change leadership, by contrast, stands at just 21% and has dropped out of the top five for the first time.

This development highlights marketing's growing responsibility for transformation and growth. It also reveals a risk: precisely because AI reaches deep into processes and roles, leadership, capability building and cultural change remain critical to success. This is also evident among marketing teams, where change management (31%) ranks among the three most important responsibilities, behind AI capabilities (56%) and marketing/brand strategy (35%).

Susan Schramm, Chief Marketing Officer, Motel One: "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."

Silvia Eggenweiler, Partner Healthcare & Life Sciences / Consumer Markets, Heidrick & Struggles: "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."

Nelson Disanto, Managing Director Naos, Bioderma Institut Esthederm Etat Pur: "The CMO moves from owner of the marketing function to architect of the growth system."

Selena Gabat, Director International Consumer Marketing, LinkedIn: "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."

Higher expectations, less room to manoeuvre for agencies

Expectations of agencies are also shifting significantly. CMOs are looking for partners that provide AI expertise, including team enablement and knowledge transfer (55%). Creativity and idea development follow almost level at 54%, alongside innovation (53%) and proactivity (51%). The message is clear: AI does not replace traditional agency strengths, but expands the requirements profile. Technology expertise must be combined with creativity, strategic consulting and the ability to embed new know-how within organisations.

At the same time, the financial room for manoeuvre is narrowing. Agencies do not automatically benefit from rising marketing budgets: only 15% of CMOs would invest additional funds in agency services. If budgets are cut, however, 65% would also reduce agency spending.

Felix Bartels, CMO, Serviceplan Group: "The message from CMOs is quite clear: they do not want less agency support, but a different kind of agency. AI is changing the conditions for creating value. At its core, the task is to enable marketing organisations: how can operating models be built to deliver the greatest impact? Creativity and innovation remain indispensable, while the pressure to demonstrate their business impact is increasing. Those who combine AI expertise, knowledge transfer and transformation support will become more relevant. Those who only execute will face greater cost pressure."

The key findings of the "CMO Barometer 2027", including analysis by experts from the Serviceplan Group and further CMO perspectives, can be found in the attached presentation.

Further information about the CMO Barometer can be found here.

The CMO Barometer:

The CMO Barometer is the Serviceplan Group's annual international study of the key priorities and challenges shaping the CMO agenda. It brings together the perspectives of marketing decision-makers from 16 countries and provides a cross-market view of the developments transforming marketing and the CMO role. The study is conducted in collaboration with the University of St. Gallen (HSG), Heidrick & Struggles, Seven.One Media and LinkedIn. Based on an online survey of marketing leaders from companies of every industry and size, a total of 655 CMOs from Germany, Austria, Belgium & Luxembourg, France, Italy, Spain, the Netherlands, Poland, Switzerland, Denmark, Sweden, Norway, Finland, the UK and the Middle East took part in September 2026. The marketing professionals shared their exclusive assessments of the 2027 marketing year.

About the University of St. Gallen (HSG):

The Institute of Marketing and Customer Insight at the University of St. Gallen (HSG) is a leading academic institution, highly regarded for its contributions to marketing and customer insight across academia, business, public policy and society.

About Heidrick & Struggles:

Heidrick & Struggles is a premier provider of executive search, leadership and talent development, and management consulting. For more than 70 years, Heidrick & Struggles has set standards in executive recruitment and today enables leading international companies, as a partner for integrated leadership solutions, to transform and shape their world.

About Seven.One Media:

Seven.One Media markets all content and platforms of ProSiebenSat.1, the home of popular entertainment and infotainment. ProSiebenSat.1 is one of the leading entertainment providers in the German-speaking market and stands for premium entertainment. The company combines its 15 free-to-air and pay-TV channels and streaming platform Joyn with its

production, distribution and advertising sales businesses. Its goal is to grow profitably and create long-term value for all stakeholders: viewers, users, advertising clients, shareholders and employees. As part of the MFE Advertising network, Seven.One Media enables advertisers to reach 190 million people across Europe through TV, Connected TV and digital platforms.

About LinkedIn:

With more than 1.4 billion members worldwide and over 33 million in German-speaking countries, LinkedIn is the world's largest digital network for professional exchange, information, inspiration, development and jobs. We connect people in the world of work and help them become more successful and fulfilled in their careers. In the LinkedIn community, members share their contributions in a professional environment and support one another. Membership is largely free of charge.

For customers in recruitment, marketing, sales and learning, we offer comprehensive opportunities to reach, engage and develop employees, potential employees and other business audiences.

With LinkedIn Pulse (formerly Economic Graph), we are creating the first digital representation of the global labour market. Using data, we visualise current trends in real time and invite representatives from politics, business and NGOs to discuss how society can respond to the changes of our time.

About the Serviceplan Group:

Serviceplan is Europe's largest independent creative agency and the founding brand of Serviceplan Group. Founded in Munich in 1970, Serviceplan brings together experts from across disciplines in integrated teams through the House of Communication model.

With its concept of ÜberCreativity and the "House of AI", Serviceplan combines human expertise, technology, and AI to create culturally relevant brand experiences and integrated communication solutions.

With more than 6,500 employees across over 43 locations in 24 countries, Serviceplan is part of one of the world's leading independent agency networks and is consistently recognized at major international creative award shows.

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