

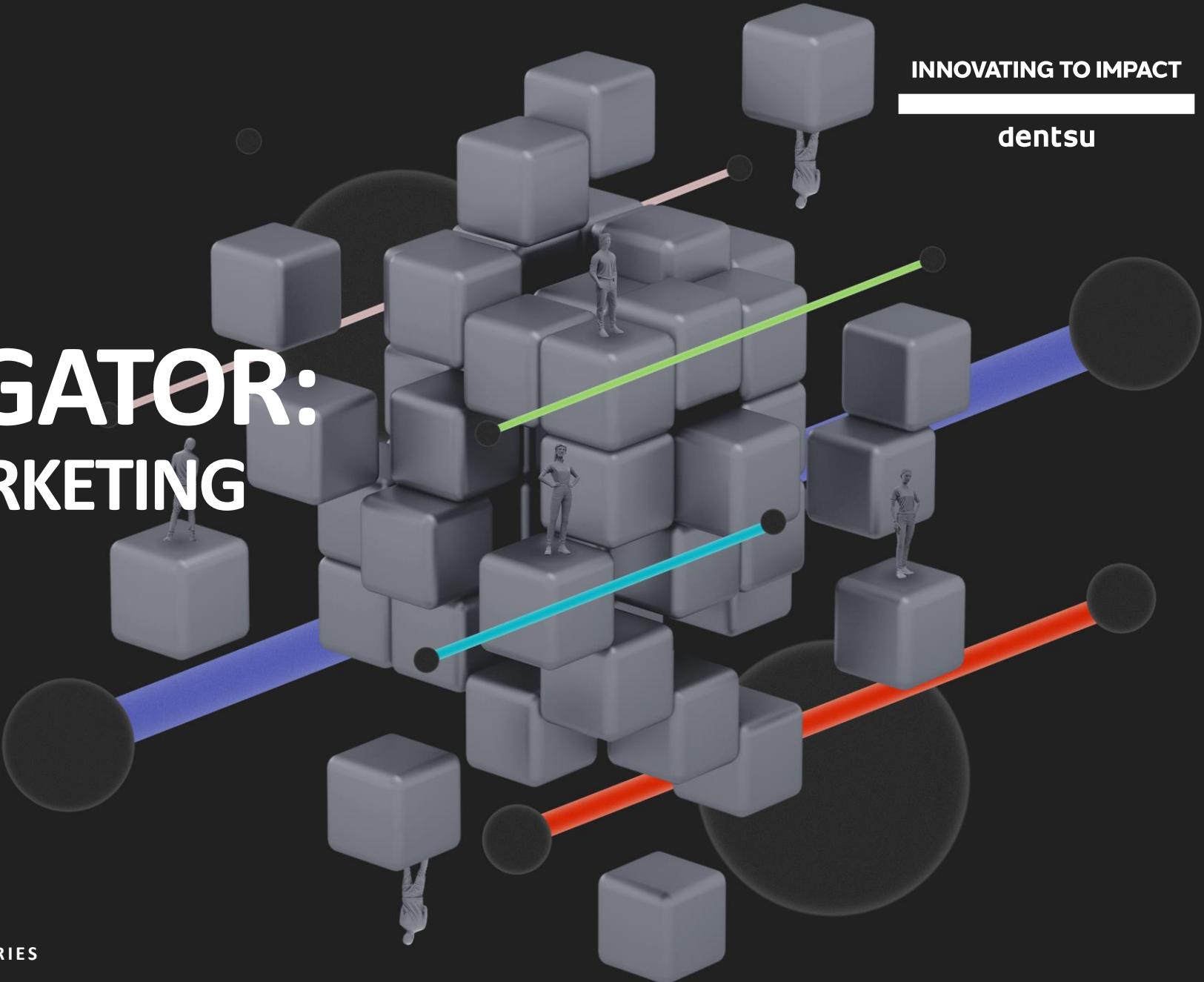
INNOVATING TO IMPACT

dentsu

MEDIA EDITION

# CMO NAVIGATOR: RETHINKING MARKETING IN THE AGE OF AI

JANUARY 2026



PART OF THE DENTSU CMO NAVIGATOR SERIES

# ABOUT THE CMO NAVIGATOR

At dentsu, we are driven to innovate. We innovate to ensure our clients can grow their businesses and to generate a positive effect on the industry, society, and the world.

We understand how consumer sentiment and expectations are evolving, and, at the same time, we understand the challenges and opportunities brands are facing. We help business leaders get a sense of how the marketplace will respond to both consumer needs and large shifts in technology and culture so they can develop their own unique points of view on how their brands can stand out and better prepare for what's next.

This is why we launched the dentsu CMO Navigator as a companion piece to our Consumer Navigator research platform. This global study, which was administered by B2B International in October 2025, collected insights from 1,950 marketing leaders across 14 countries.

This report is a companion piece to the [Dentsu Creative 2025 CMO Survey](#) and the [CX Edition of the 2025 CMO Navigator](#) by Merkle, dentsu's global experience and transformation consultancy. To complete our exploration of marketing areas of focus, this report focuses on media transformation and media's evolution into a strategic driver of business growth.

The insights at the heart of this report were collected last fall and will be labeled with 2025. Nonetheless, CMOs were asked to discuss their plans for the 12 months ahead, making this report a quintessential read to kick off 2026.

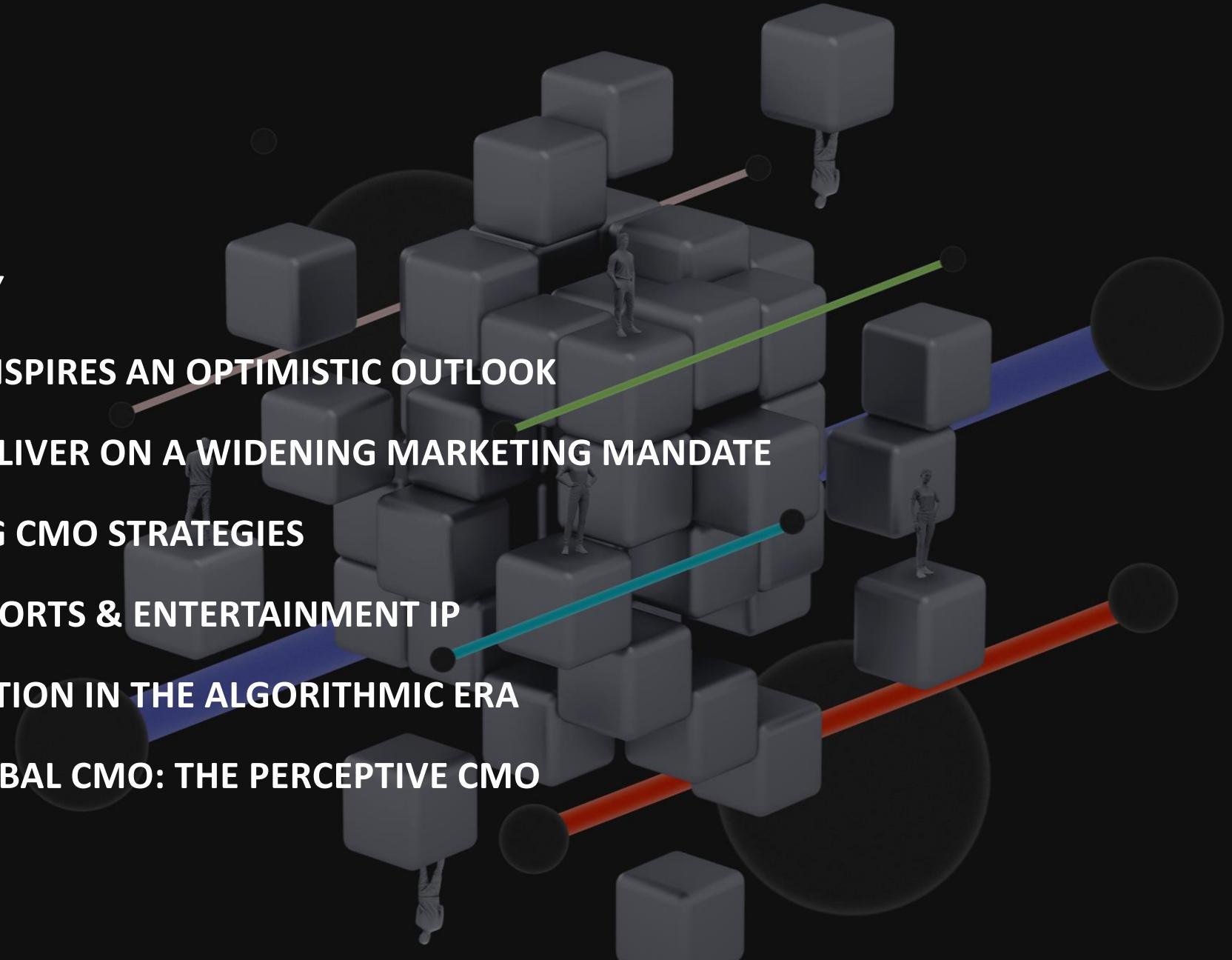
Beyond offering an insight into CMO mindsets, this report also helps clients understand the business climates stakeholders in different sectors and different parts of the world are navigating. To better fulfill both objectives, we present Japan CMOs as a standalone audience in our regional deep dives, as our analysis showed that their sentiment and points of view are often at odds with their APAC colleagues.

This report also leverages findings from our Consumer Navigator research platform to compare CMO views on the landscape of culture and entertainment with their customers' views.

Overall, you'll see in the report that most CMOs now have a second job. Not only do they need to drive growth, but they also need to largely focus on the transformation of the marketing function in light of AI's significant impact on reshaping strategies across all markets and all sectors. With that in mind, let's dive into the Executive Summary of our findings!



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# EXECUTIVE SUMMARY

## BUSINESS GROWTH INSPIRES AN OPTIMISTIC OUTLOOK

Despite consumers' pessimistic views on the economy, CMOs' outlook is largely optimistic as a result of positive business performance.

Tariff and trade volatility have not (yet?) impacted brands' business results, but it is informing slight caution.

As a vast majority of businesses report positive business performance, differentiation is sought in increasing investments in brand.

## LEANING ON AI TO DELIVER ON A WIDENING MARKETING MANDATE

Redesigning marketing in the age of AI is the new mission of CMOs.

The scope of marketing responsibilities keeps growing as business matures.

CMOs forecast a radically transformed business landscape and will pursue transformation initiatives to better prepare their organizations to thrive in it.

## HOW AI IS RESHAPING CMO STRATEGIES

In a very dynamic environment, CMOs are facing different challenges depending on the contexts in which their brands operate.

AI is having a profound impact on all CMOs' strategies regardless of their specific approaches, and its adoption is the common denominator among them.

The desire to lean into uncharted territories is likely leading CMOs to seek support outside their organization.

## PARTNERING WITH SPORTS & ENTERTAINMENT IP

CMOs are increasing their investment in a variety of entertainment partnership opportunities to strengthen their connections with consumers.

In addition to IP partnerships, CMOs are making sure their brands are present in the spaces and communities where entertainment is adapted and discussed.

CMOs are divided on whether entertainment IP, as a means for brands to engender loyalty, will be affected by increasing reliance on AI or not.

## MEDIA TRANSFORMATION IN THE ALGORITHMIC ERA

CMOs are turning to media to bridge their brands' worlds and their consumers' worlds.

Artificial intelligence is top of mind for CMOs, but they need guidance to focus on the right opportunities.

Despite strong consensus on the importance of attention, its impact across NextGen video has been unclear until now.

## A NEW BREED OF GLOBAL CMO: THE PERCEPTIVE CMO

Perceptive CMOs are more aligned with consumers when it comes to how brands should connect with entertainment.

Perceptive CMOs drive better business results by living at the intersection of consumer wants and business needs.

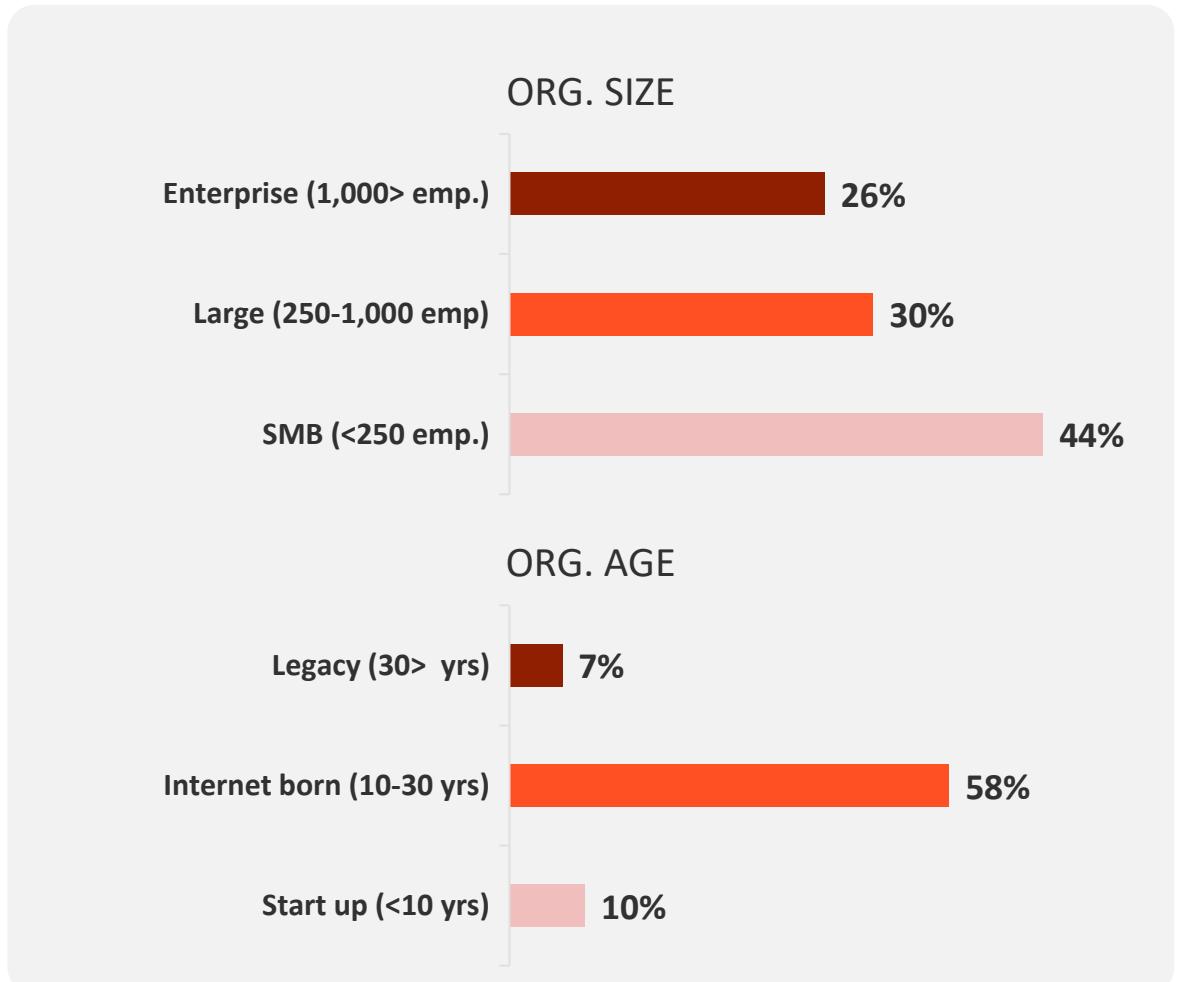
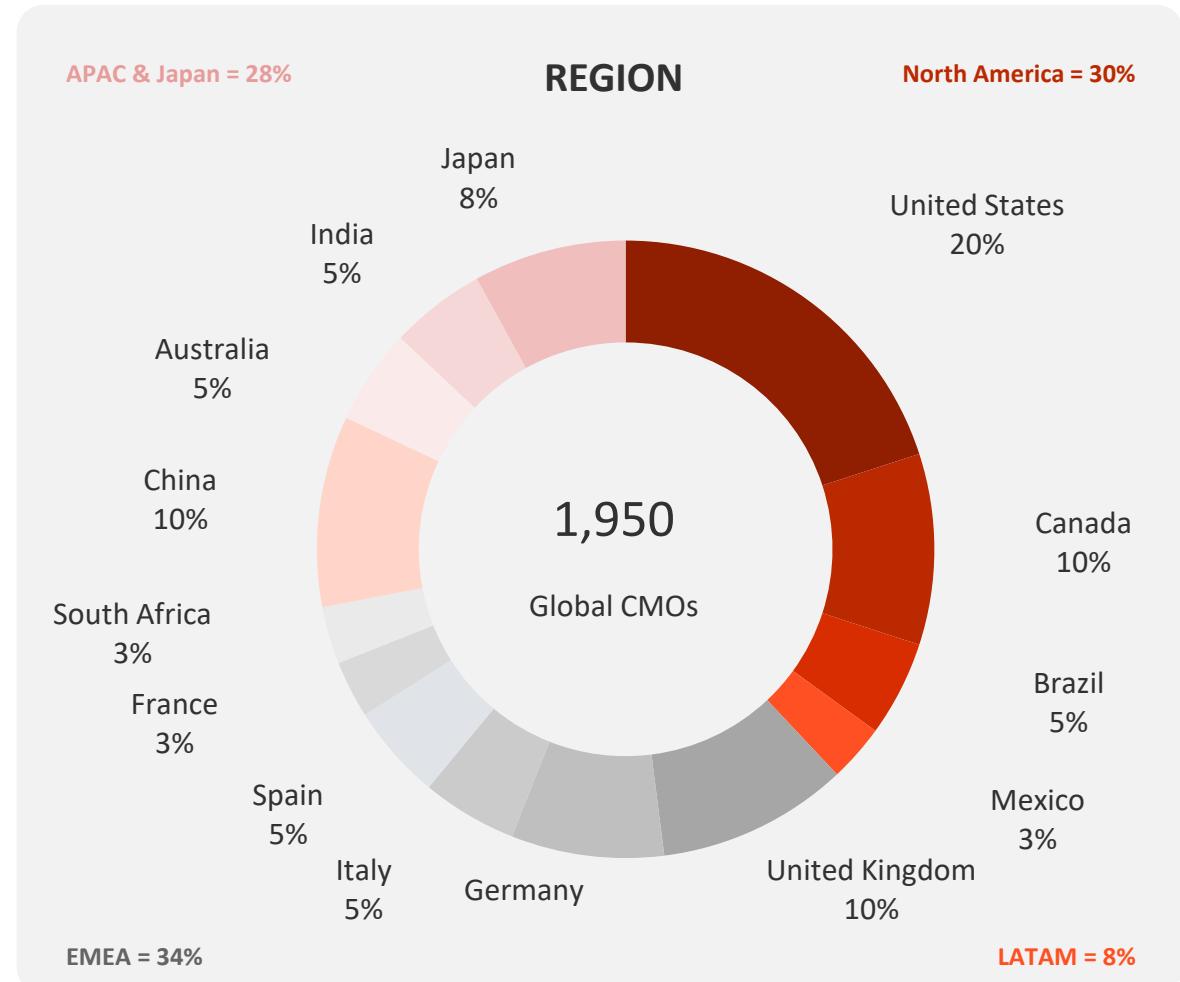
Perceptive CMOs invest more in innovation, business transformation and net new portfolios of offerings than their peers.

Perceptive CMOs are more likely to see media that connects with culture as a way to garner consumer attention and drive growth.



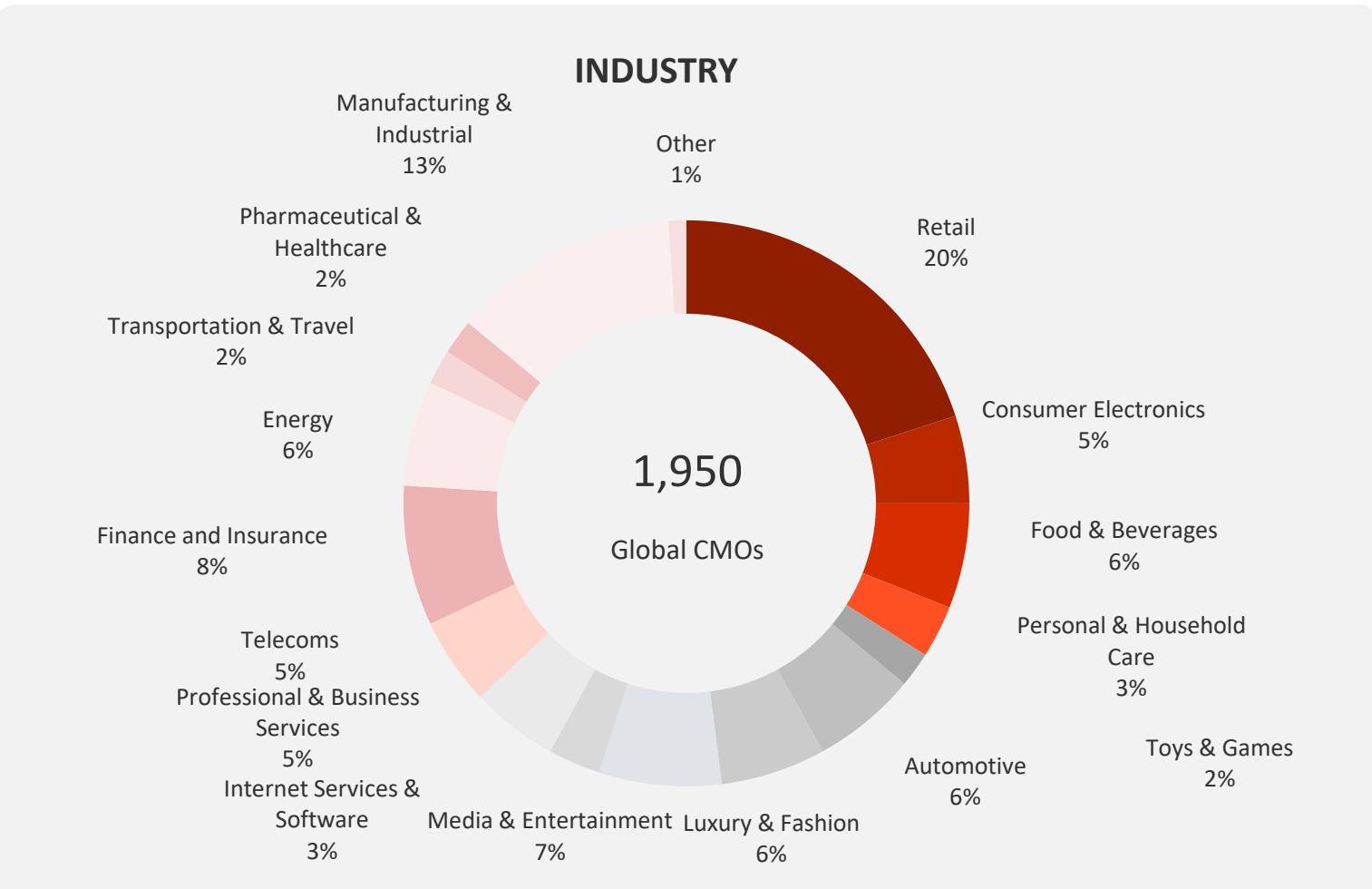
# WHO WE SPOKE WITH

## RESPONDENT BREAKDOWN

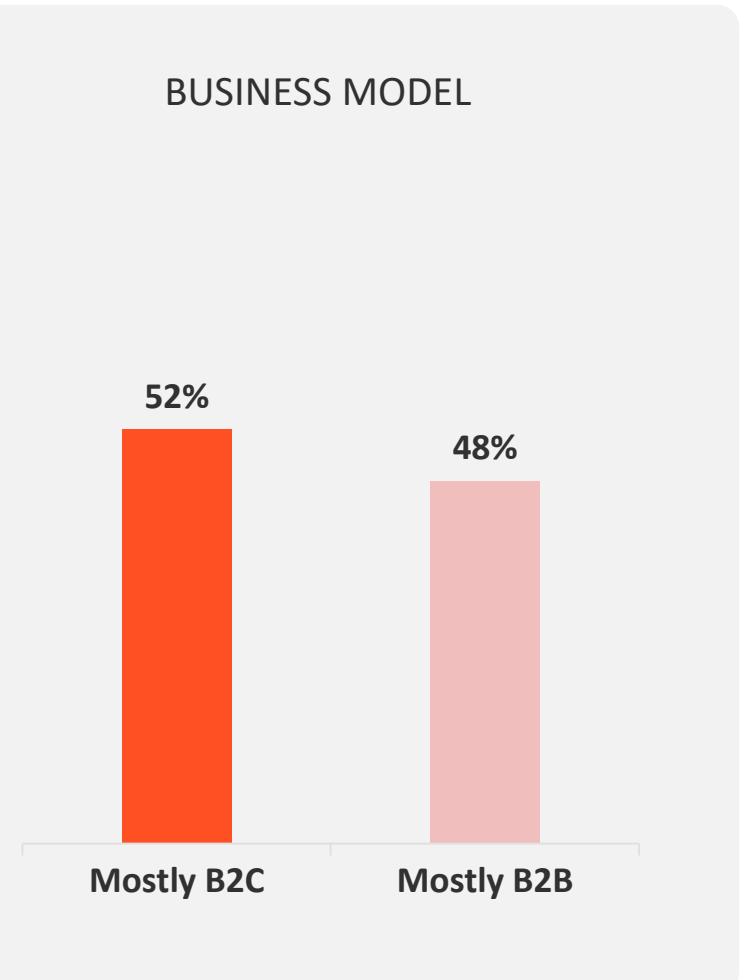


# WHO WE SPOKE WITH

## BUSINESS BREAKDOWN



## BUSINESS MODEL



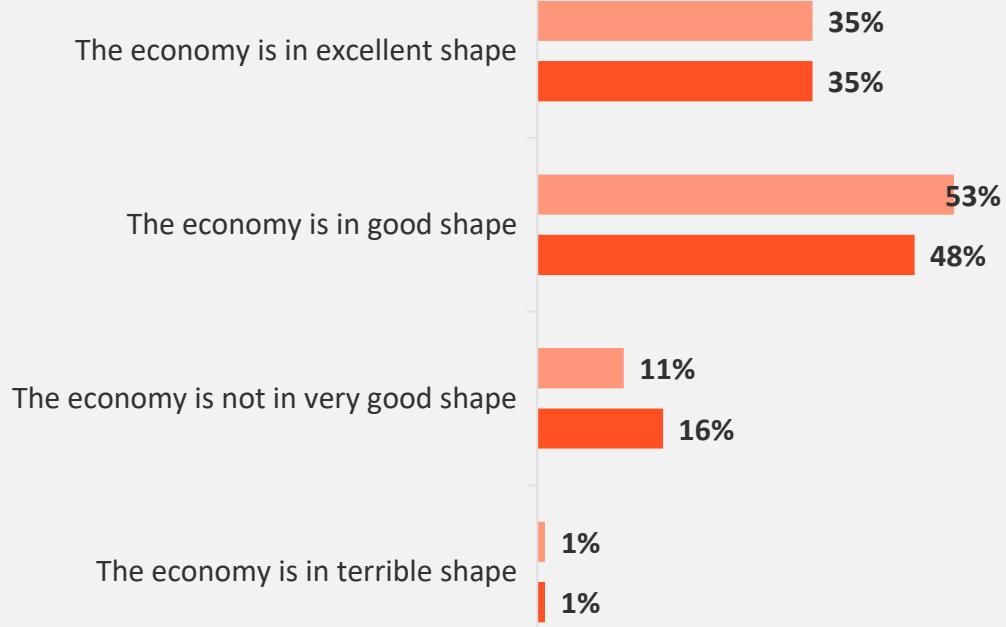
# BUSINESS GROWTH INSPIRES AN OPTIMISTIC OUTLOOK

# WHILE SLIGHTLY WORSENER COMPARED TO A YEAR AGO, CMO ASSESSMENT OF THE ECONOMY REMAINS POSITIVE

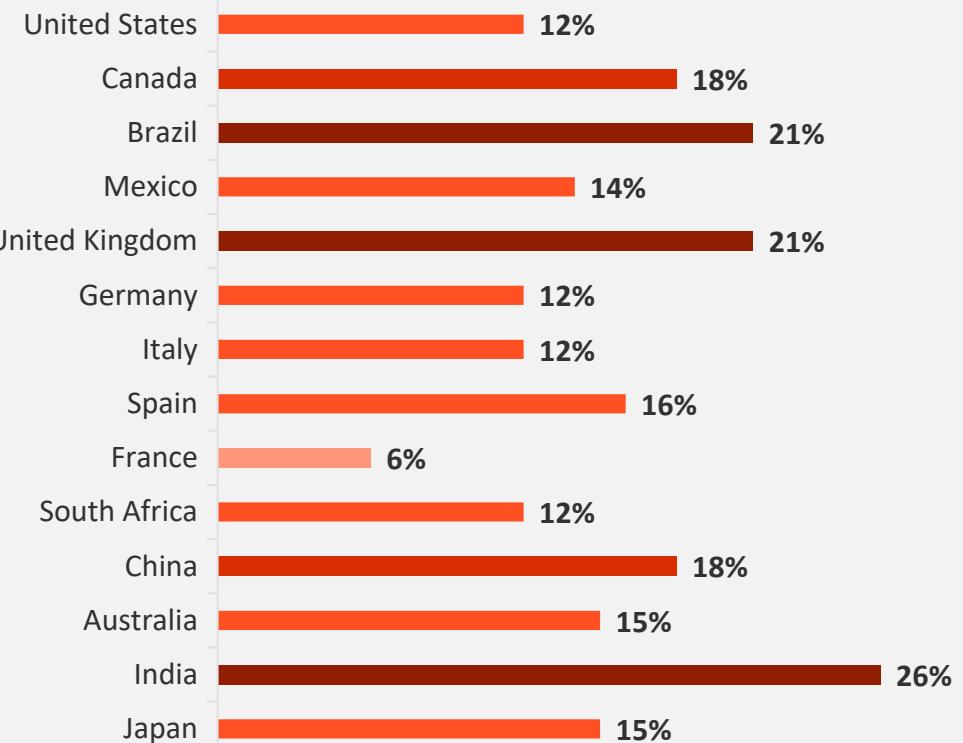
3 in 4 CMOs think the economy is in good shape. CMOs based in the UK, India, and Brazil are more likely to say the economy is not in very good shape.

## ASSESSMENT OF THE ECONOMY IN YOUR COUNTRY

2024 2025



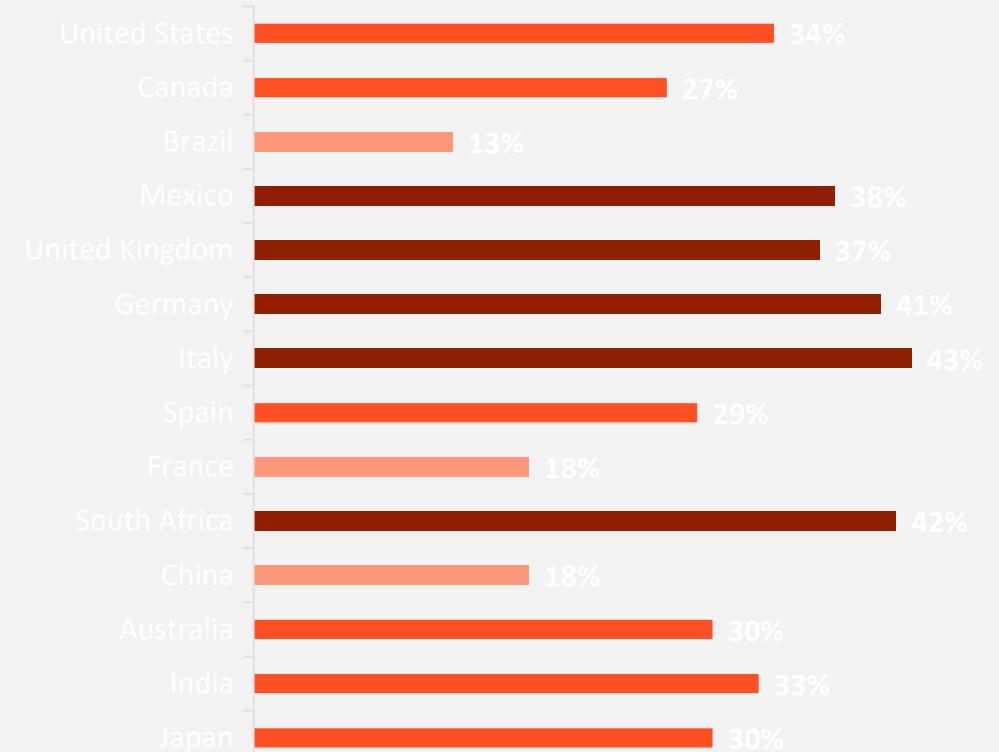
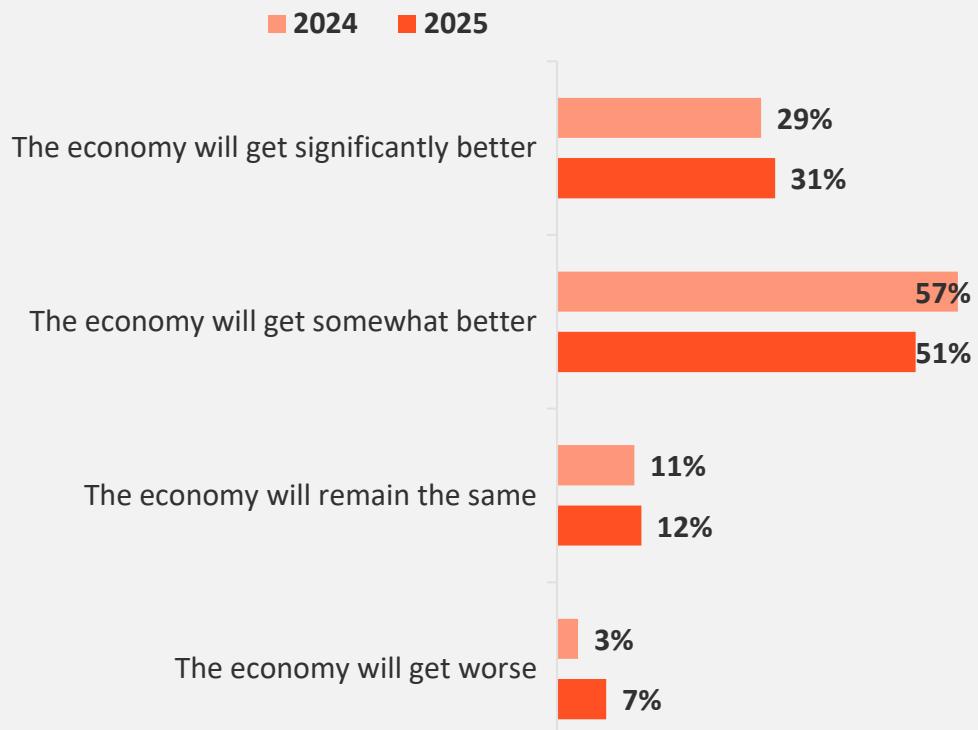
## THE ECONOMY IS NOT IN VERY GOOD SHAPE



# CMOs' ASSESSMENT OF THE FUTURE DIRECTION OF THE ECONOMY IS ALSO OPTIMISTIC

Yet, the share of optimistic CMOs was even larger a year ago. CMOs in Mexico, the UK, Germany, Italy, and South Africa are particularly optimistic.

## ASSESSMENT OF THE DIRECTION OF THE ECONOMY



# ONLY 1 IN 4 CMOs REPORT THAT THE ECONOMY HAS NEGATIVELY AFFECTED THEIR BUSINESS

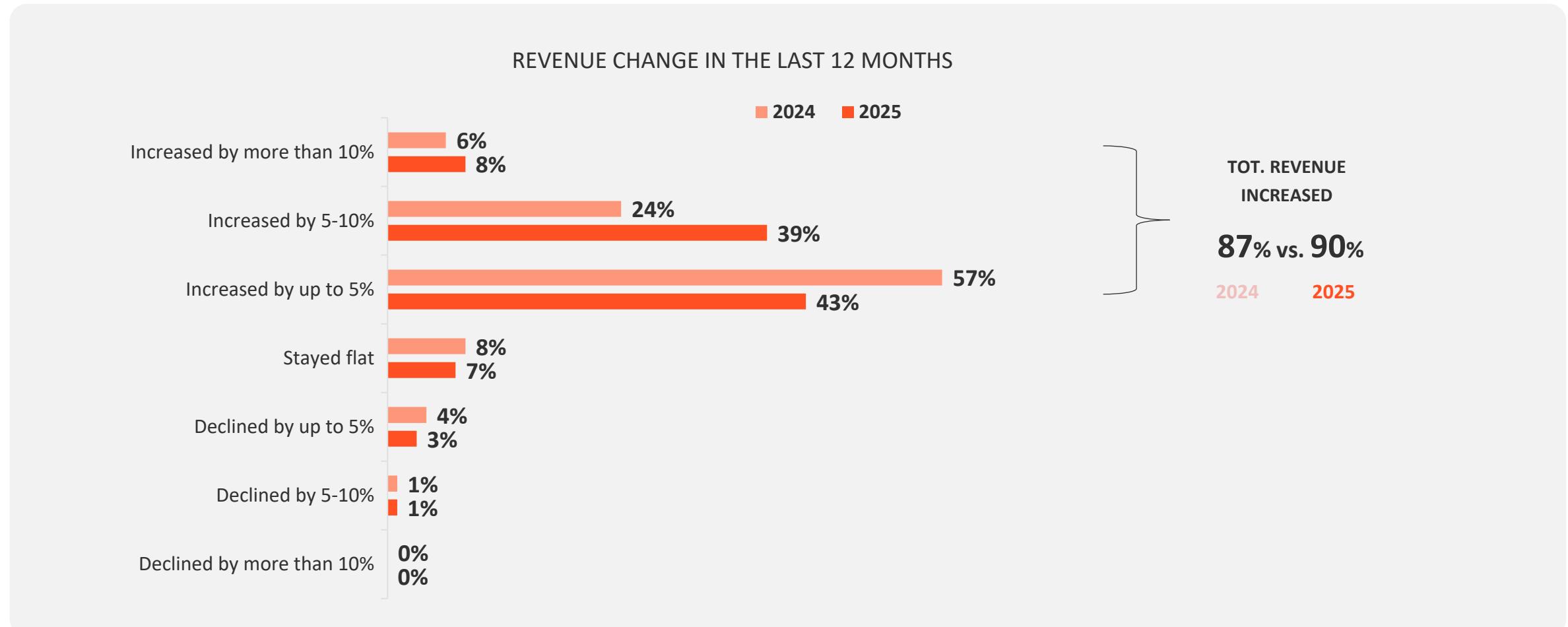
APAC CMOs are more likely to say the economy negatively affected their business, and so do CMOs working in Professional Services and Legacy brands.

## IMPACT OF THE ECONOMIC ENVIRONMENT ON BUSINESS PROSPECTS



# IN FACT, THE VAST MAJORITY OF CMOs REPORT THAT THEIR ORGANIZATIONS' REVENUE HAS INCREASED

The share is even higher than that seen last year.



# LATAM BUSINESSES ARE MORE LIKELY TO HAVE EXPERIENCED REVENUE GROWTH IN THE LAST 12 MONTHS

On the other hand, APAC CMOs are most likely to report their organizations' revenues have stayed flat.

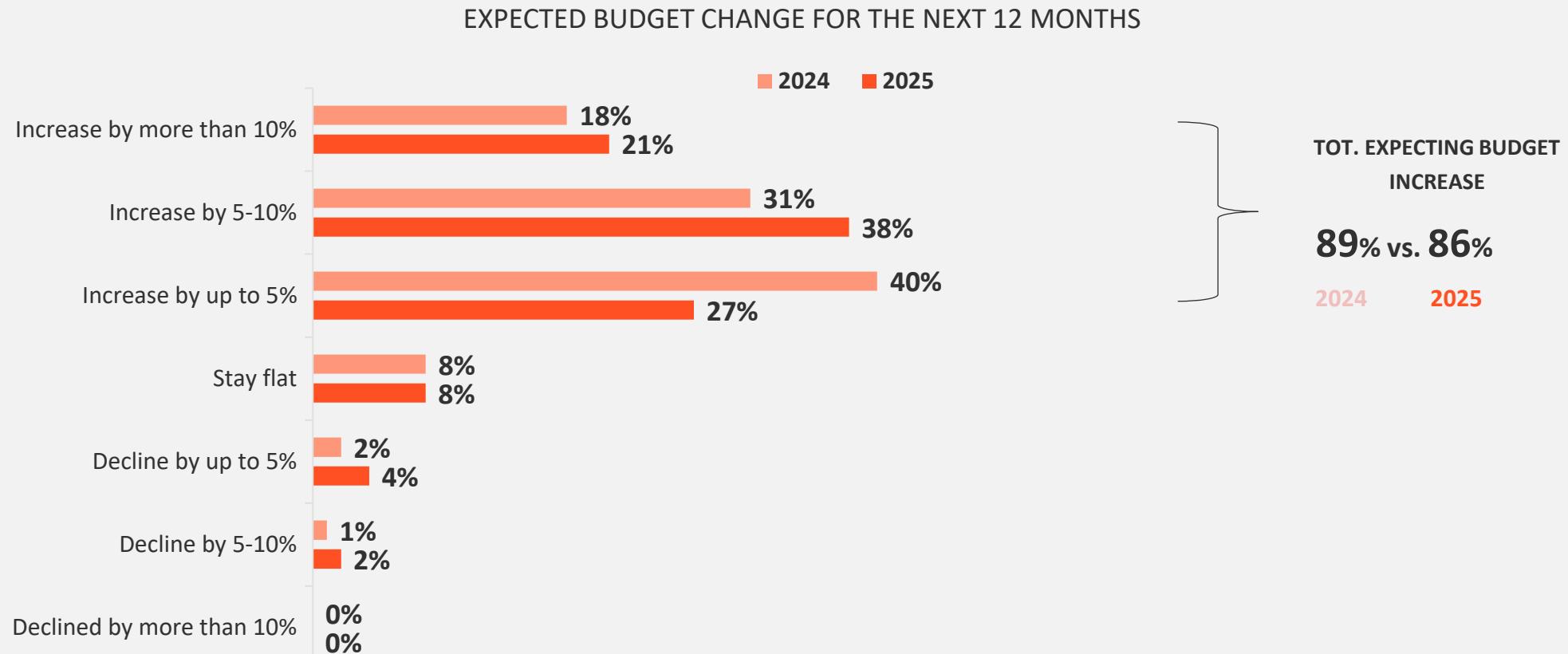
REVENUE CHANGE IN THE LAST 12 MONTHS

	ALL CMOs	North America	Latin America	EMEA	APAC	Japan
Increased by 10% or more	8%	10%	14%	7%	7%	5%
Increased between 5 and 10%	39%	43%	32%	39%	37%	33%
Increased by up to 5%	43%	39%	50%	43%	38%	49%
<b>Revenue increase total</b>	<b>90%</b>	<b>92%</b>	<b>96%</b>	<b>89%</b>	<b>82%</b>	<b>87%</b>
<b>Stayed flat</b>	<b>7%</b>	<b>5%</b>	<b>3%</b>	<b>6%</b>	<b>13%</b>	<b>6%</b>
Decreased by up to 5%	3%	2%	0%	3%	4%	4%
Decreased between 5 and 10%	1%	1%	1%	2%	2%	3%
Decreased by 10% or more	0%	0%	0%	0%	0%	1%
<b>Revenue decrease total</b>	<b>4%</b>	<b>3%</b>	<b>1%</b>	<b>5%</b>	<b>6%</b>	<b>8%</b>



# POSITIVE BUSINESS PERFORMANCE LEADS MOST CMOs TO EXPECT THEIR MARKETING BUDGET FOR THE NEXT 12 MONTHS TO INCREASE

The share is slightly lower compared to last year, but the share of those expecting more significant increases has grown.



# NORTH AMERICA AND LATAM CMOs ARE MORE OPTIMISTIC ABOUT BUDGET INCREASES FOR THE NEXT 12 MONTHS

On the other hand, APAC and Japan CMOs are more conservative in their expectations.

EXPECTED BUDGET CHANGE IN THE NEXT 12 MONTHS

	ALL CMOs	North America	Latin America	EMEA	APAC	Japan
Increase by 10% or more	21%	23%	19%	21%	18%	16%
Increase between 5 and 10%	38%	41%	40%	38%	35%	35%
Increase by up to 5%	27%	25%	30%	28%	28%	25%
<b>Expected budget increase total</b>	<b>86%</b>	<b>89%</b>	<b>89%</b>	<b>87%</b>	<b>81%</b>	<b>76%</b>
<b>Stayed flat</b>	<b>8%</b>	<b>7%</b>	<b>5%</b>	<b>7%</b>	<b>10%</b>	<b>13%</b>
Decreased by up to 5%	4%	2%	3%	4%	5%	10%
Decreased between 5 and 10%	2%	2%	2%	1%	2%	1%
Decreased by 10% or more	0%	1%	1%	1%	2%	0%
<b>Expected budget decrease total</b>	<b>6%</b>	<b>5%</b>	<b>6%</b>	<b>6%</b>	<b>9%</b>	<b>11%</b>



# INVESTMENTS IN BRAND ARE BEING PRIORITIZED BY CMOs IN THE ALLOCATION OF THEIR RESOURCES

Just like last year, investments in demand rank highest. However, they have experienced a slight decline whereas investments in brand have grown.

## TOP PRIORITY FOR RESOURCE ALLOCATION

### PRODUCT & DEMAND

Initiatives to develop new ways to stimulate, capture and respond to customer demand, including new product development

**38%** **35%**

2024 vs. 2025

### BUSINESS TRANSFORMATION

Initiatives that drive new business models, go-to-market strategies and organizational processes and structures

**24%** **23%**

2024 vs. 2025

### BRAND

Initiatives that intersect culture to build and strengthen brand awareness, equity and affinity

**23%** **27%**

2024 vs. 2025

### CUSTOMER EXPERIENCE

Initiatives to evolve and enrich the ways that the business connects with, provides services to, and builds relationships with customers

**15%** **15%**

2024 vs. 2025



## DESPITE CONSUMERS' PESSIMISTIC VIEWS ON THE ECONOMY, CMOs' OUTLOOK IS LARGELY OPTIMISTIC AS A RESULT OF POSITIVE BUSINESS PERFORMANCE

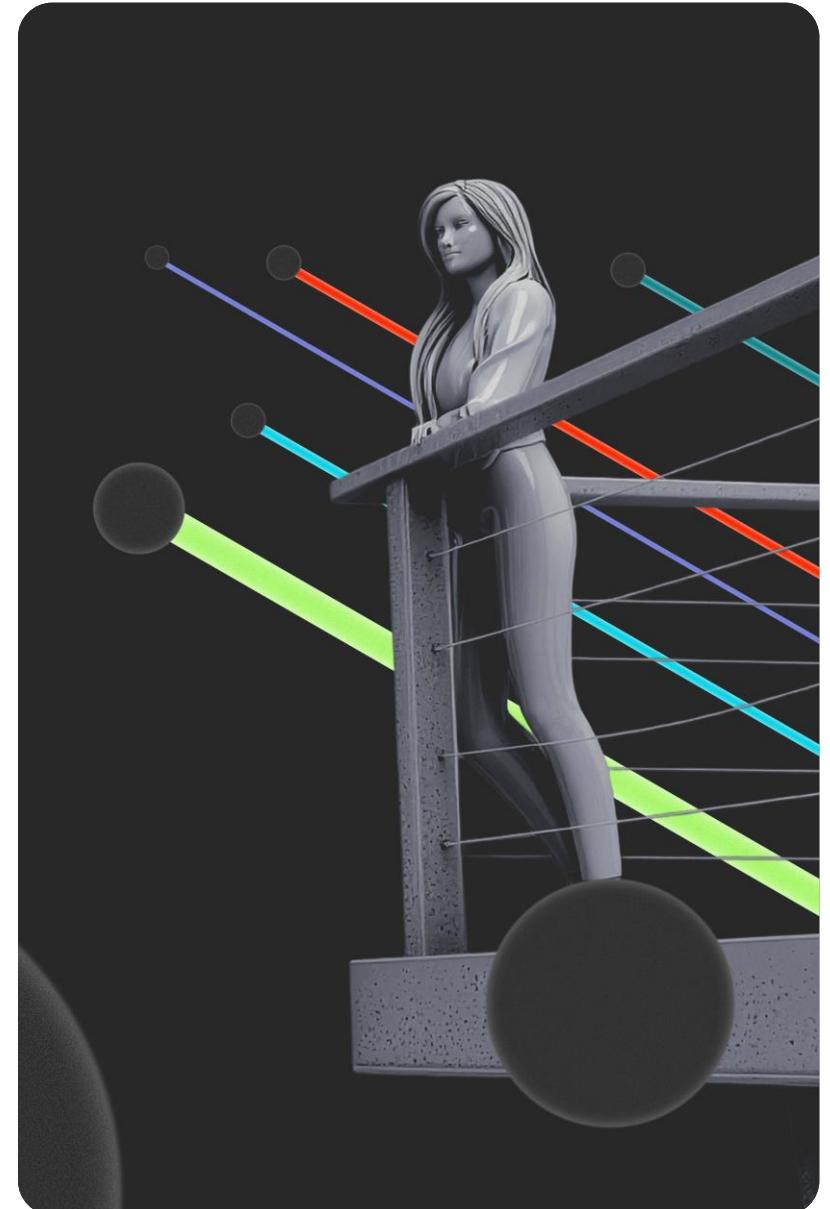
Most CMOs think the economy is in good shape and that it will get even better. It does not seem coincidental that an overwhelming majority are reporting revenue increases. The positive state of the business is likely informing their views on their operating financial climate.

## TARIFF AND TRADE VOLATILITY HAVE NOT (YET?) IMPACTED BRANDS' BUSINESS RESULTS, BUT IT IS INFORMING SLIGHT CAUTION

The share of CMOs reporting revenue increases in the last 12 months is higher than what was reported a year ago. However, the share of CMOs expecting budget increases is slightly lower compared to a year ago, denoting how the current trade climate is leading some to err on the side of caution.

## AS A VAST MAJORITY OF BUSINESSES REPORT POSITIVE BUSINESS PERFORMANCE, DIFFERENTIATION IS SOUGHT IN INCREASING INVESTMENTS IN BRAND

In an environment where most organizations report healthy business performance and everyone is competing for eroding consumer attention across a growing number of channels, CMOs seek to enrich the ways in which their brands are showing up and intersect with culture.



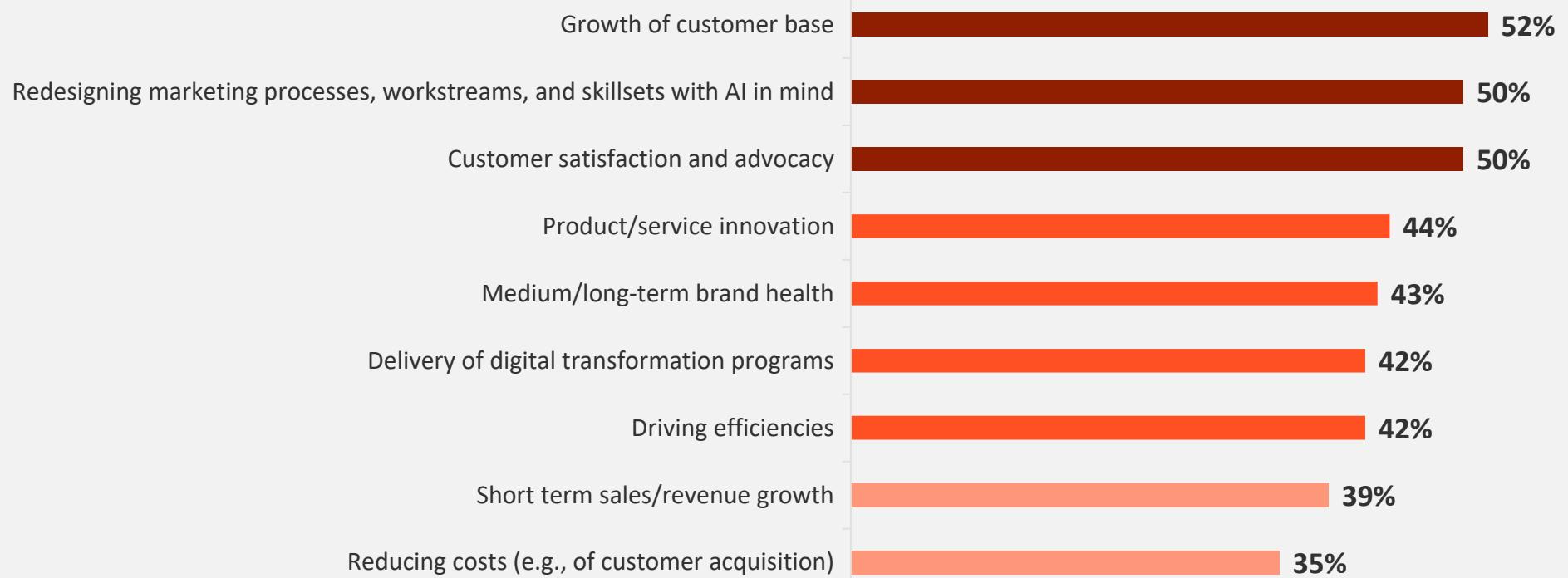
# LEANING ON AI TO DELIVER ON A WIDENING MARKETING MANDATE



# OVERSEEING THE AI-LED TRANSFORMATION OF THE MARKETING FUNCTION IS NOW A CORE CMO RESPONSIBILITY

The share of CMOs being measured for this new responsibility is comparable with the share of CMOs being made accountable for the growth of the customer base or for customer satisfaction.

## BUSINESS RESULTS CMOs ARE ACCOUNTABLE FOR



# CMOs BASED IN APAC ARE SIGNIFICANTLY MORE LIKELY TO BE TASKED WITH A WIDER MARKETING MANDATE

LATAM CMOs are more likely to be chartered with driving efficiencies and driving profits at a lower cost.

## BUSINESS RESULTS CMOs ARE ACCOUNTABLE FOR

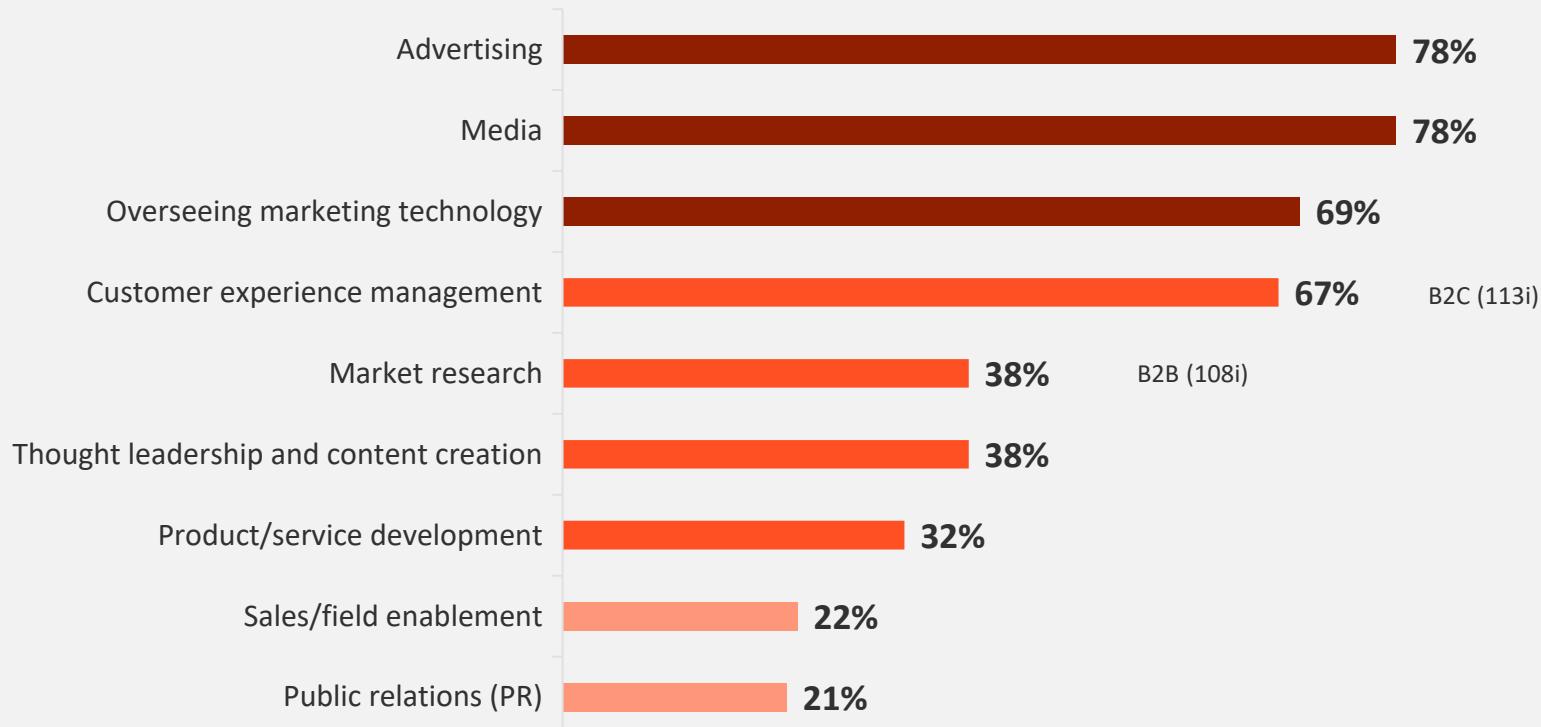
	ALL CMOs	North America	Latin America	EMEA	APAC	Japan
Growth of customer base	52%	54%	51%	50%	55%	50%
Redesigning marketing with AI in mind	50%	49%	57%	49%	56%	42%
Customer satisfaction and advocacy	50%	51%	45%	47%	57%	43%
Product/service innovation	44%	43%	43%	42%	50%	37%
Medium/long-term brand health	43%	41%	43%	43%	43%	50%
Delivery of digital transformation programs	42%	43%	35%	40%	50%	35%
Driving efficiencies	42%	38%	54%	38%	47%	46%
Short-term sales/revenue growth	39%	36%	55%	38%	40%	37%
Reducing costs	35%	35%	43%	31%	39%	33%



# MEDIA AND ADVERTISING CONTINUE TO BE THE BREAD AND BUTTER OF CMO JOB RESPONSIBILITIES

Marketing departments in B2C organizations over-index on being chartered with customer experience management, whereas market research is more commonly owned by marketing departments in B2B companies.

## RESPONSIBILITIES OF THE MARKETING DEPARTMENT



# MARKETING TENDS TO ACQUIRE A BROADER SET OF RESPONSIBILITIES IN ORGANIZATIONS THAT HAVE BEEN IN MARKET LONGER

CMOs in companies that emerged during the digital revolution are more likely to say their marketing departments are responsible for CX and martech.

RESPONSIBILITIES OF THE MARKETING DEPARTMENT

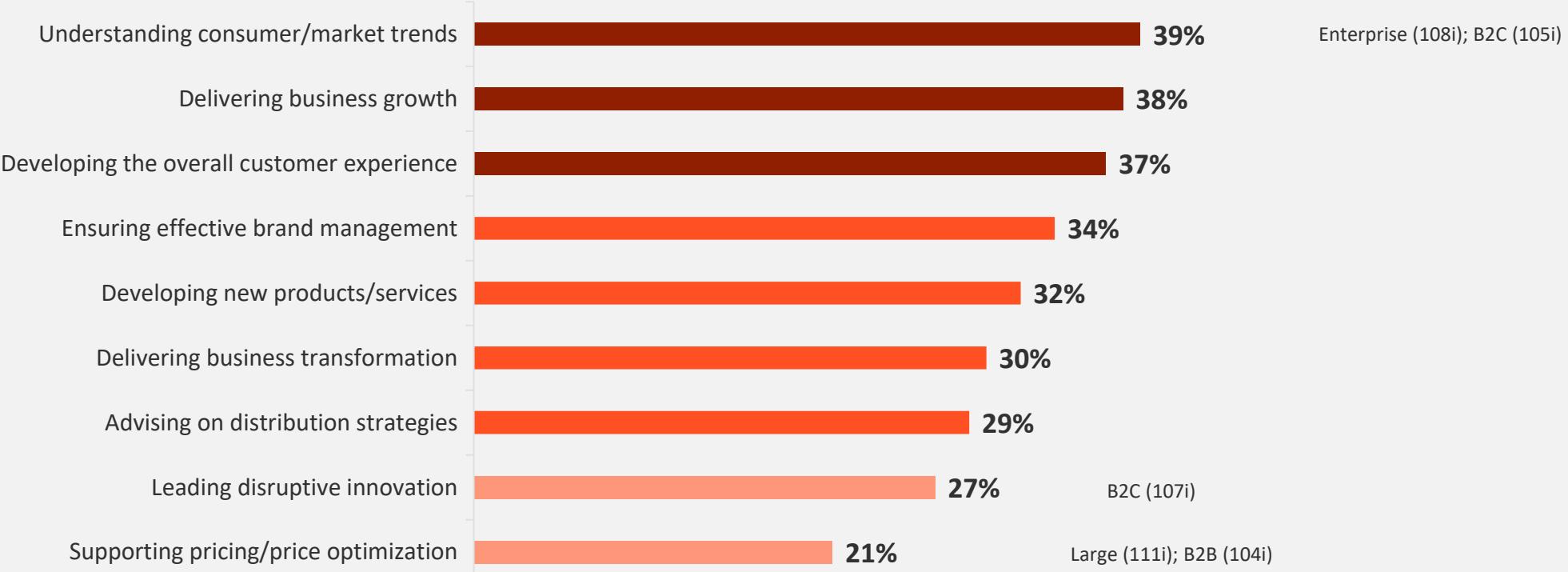
	ALL CMOS	Legacy	Internet born	Start up
Advertising	78%	80%	81%	74%
Media	78%	79%	77%	80%
Overseeing marketing technology	69%	63%	71%	67%
Customer experience management	67%	65%	70%	64%
Market research	38%	40%	36%	40%
Thought leadership and content creation	38%	43%	37%	39%
Product/service development	32%	32%	31%	35%
Sales/field enablement	22%	27%	24%	17%
Public relations/PR	21%	31%	19%	23%



# MARKETING'S ELEVATION FROM A STEWARD OF BRAND & COMMS INTO A DRIVER OF BUSINESS GROWTH AND TRANSFORMATION CONTINUES

CMOs in consumer facing companies over-index on understanding trends and leading disruptive innovation. CMOs in B2B organizations are more likely to say that part of their focus will be placed on pricing optimization.

## ROLE OF THE MARKETING FUNCTION IN THE NEXT 12 MONTHS



# CMOs' VIEWS ON THE FUTURE ROLE OF THE MARKETING FUNCTION VARY ACROSS REGIONS

CMOs in Japan over-index on indicating marketing will focus on R&D, while CMOs based in the Americas report a more pronounced focus on growth. EMEA CMOs expect to be busy navigating pricing and distribution challenges.

## ROLE OF THE MARKETING FUNCTION IN THE NEXT 12 MONTHS

### NORTH AMERICA

Delivering business growth (108i)  
Supporting pricing optimization (108i)

### LATAM

Delivering business growth (113i)  
Ensuring effective brand management (112i)

### EMEA

Supporting pricing optimization (115i)  
Advising on distribution strategies (107i)

### APAC

Understanding market trends (115i)  
Developing the overall CX (114i)

### JAPAN

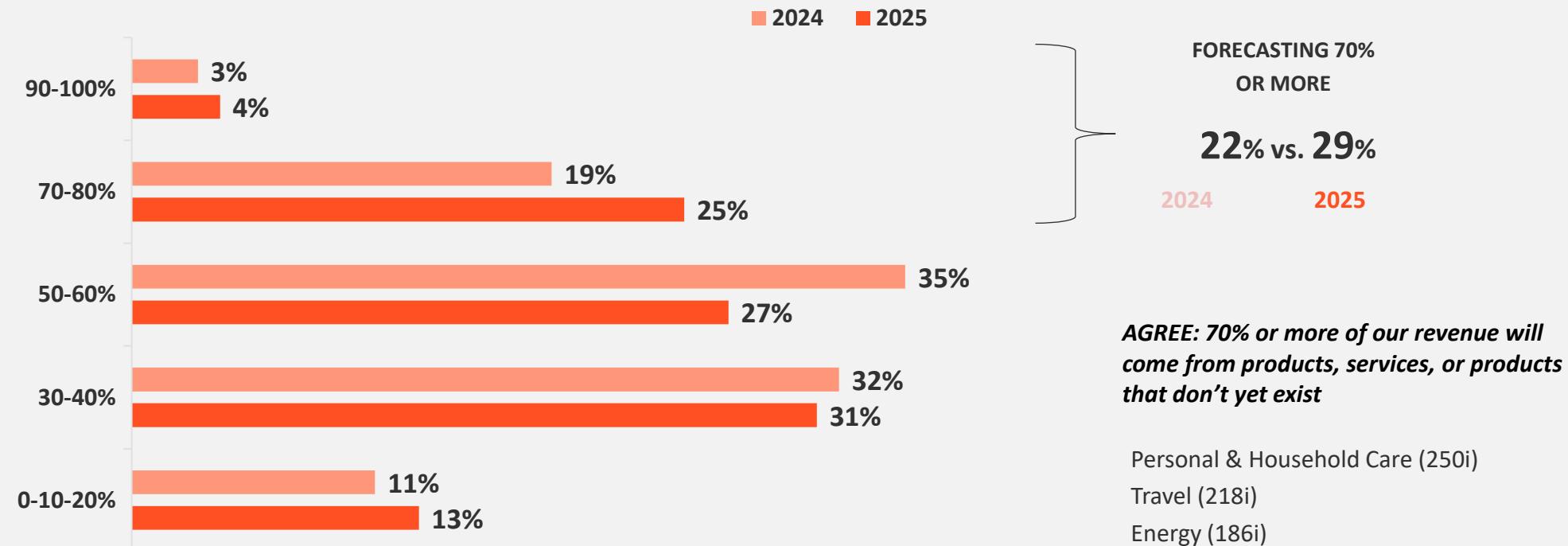
Developing new products/services (116i)  
Understanding market trends (115i)



# CMOs FORECAST A RADICALLY TRANSFORMED BUSINESS LANDSCAPE WHERE REVENUE IS DRIVEN BY OFFERINGS THAT DON'T YET EXIST

The share of those expecting that 70% of their organizations' revenues will be driven by yet-to-come disruption is even higher than reported a year ago. CMOs in personal products, travel, and energy are significantly more likely to expect a disrupted marketplace five years from now.

% OF ORGANIZATION'S REVENUE EXPECTED TO COME FROM PRODUCTS, SERVICES, BUSINESS THAT DON'T EXIST YET 5 YEARS FROM NOW



# THIS PERSPECTIVE IS LEADING MOST ORGANIZATIONS TO PURSUE TRANSFORMATION EFFORTS AND EVOLVE THEIR BUSINESS

Despite the complex environment tied to evolving tariff regulations, expansion to new geographies is a transformation strategy that CMOs are increasingly turning to compared to a year ago.

## TRANSFORMATION STRATEGIES PURSUED TO DELIVER BUSINESS GROWTH



# WHILE NEW EXPERIENCES GARNER MOST PREFERENCES GLOBALLY, THERE ARE NUANCES ACROSS REGIONS IN TERMS OF PRIORITIZING THE PATHS TO GROWTH

CMOs in Japan over-index on reporting their organizations are evolving their commercial model in the pursuit of growth, while LATAM companies are looking to monetize their experiences and touchpoints in new ways (e.g., retail media).

## TRANSFORMATION STRATEGIES PURSUED TO DELIVER BUSINESS GROWTH

### NORTH AMERICA

Expanding assortments of existing prod./serv. (105i)

### LATAM

Monetizing experiences in new ways (122i)

Launching net new prod./serv. (118i)

### EMEA

Building our own marketplace (108i)

Changing our commercial model (107i)

### APAC

Launching new experiences (110i)

Launching net new prod./serv. (110i)

### JAPAN

Changing our commercial model (114i)

Expanding to new geos (103i)



# INDUSTRY SECTORS ARE LOOKING TO SIGNIFICANTLY EVOLVE HOW THEY GO TO MARKET

Luxury brands over-index on evolving their commercial model and expanding their product lines, while retail stands out for exploring new ways to monetize of experiences and touchpoints, and for setting up marketplaces to resell third-party products and services.

## TRANSFORMATION STRATEGIES PURSUED TO DELIVER BUSINESS GROWTH

### A U T O M O T I V E

Launching new experiences (115i)

Expanding assortments of prod./serv. (105i)

### E N E R G Y

Monetizing experiences in new ways (109i)

Building our own marketplace (110i)

### F I N A N C E & I N S U R A N C E

*No significant over-indexation*

### F O O D & B E V E R A G E

Expanding to new geos (131i)

Expanding assortments of prod./serv. (121i)

### L U X U R Y

Changing our commercial model (124i)

Expanding assortments of prod./serv. (133i)

### M A N U F A C T U R I N G

*No significant over-indexation*

### M E D I A & E N T E R T A I N M E N T

Launching new experiences (105i)

Changing our commercial model (105i)

### P R O F E S S I O N A L S E R V I C E S

Expanding to new geos (108i)

### R E T A I L

Monetizing our experiences in new ways (108i)

Building our own marketplace (108i)

### T E L E C O M

Launching net new prod./serv. (125i)

Expanding to new geos (106i)



## REDESIGNING MARKETING IN THE AGE OF AI IS THE NEW MISSION OF CMOs

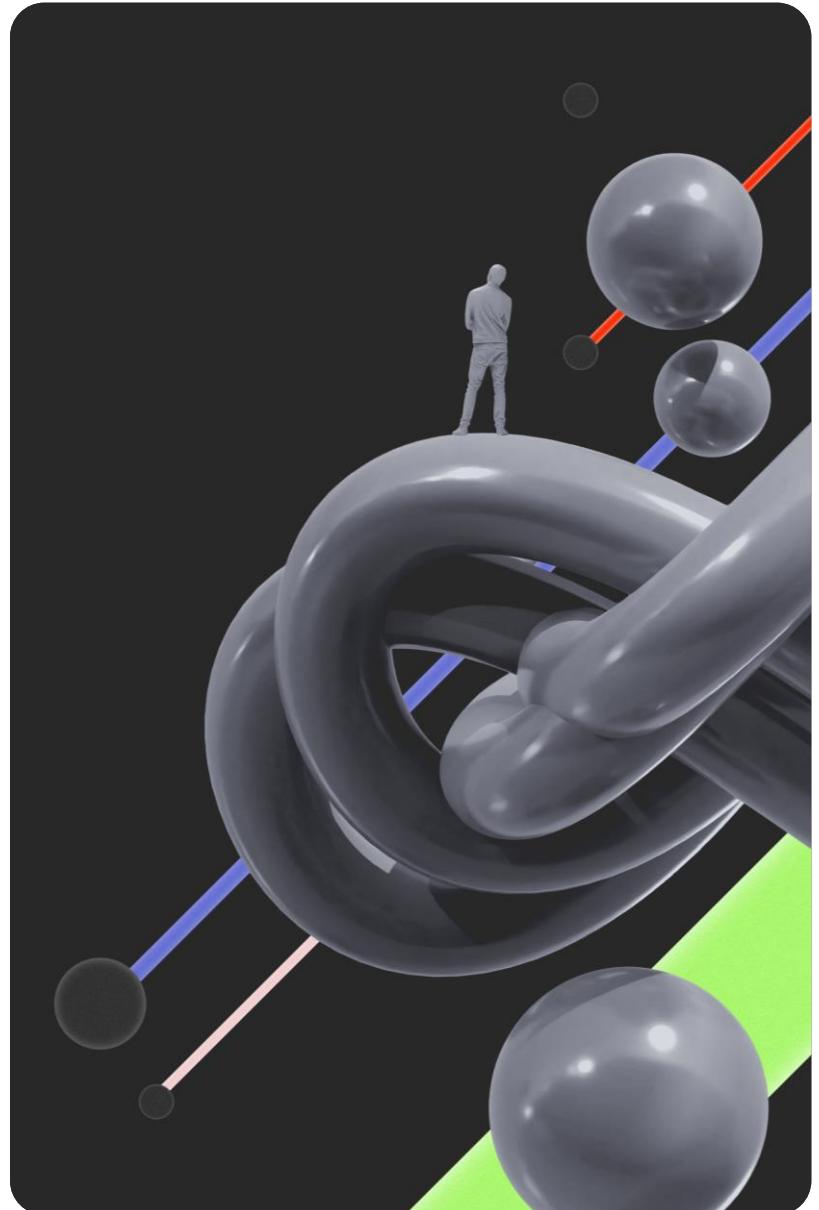
When reporting on their current marketing mandate, CMOs unsurprisingly put growth and customer satisfaction at the top of the list. But overseeing the transformation of marketing processes, workstreams, and skillsets with AI in mind is emerging as an imperative.

## THE SET OF MARKETING RESPONSIBILITIES KEEPS GROWING AS BUSINESS MATURE

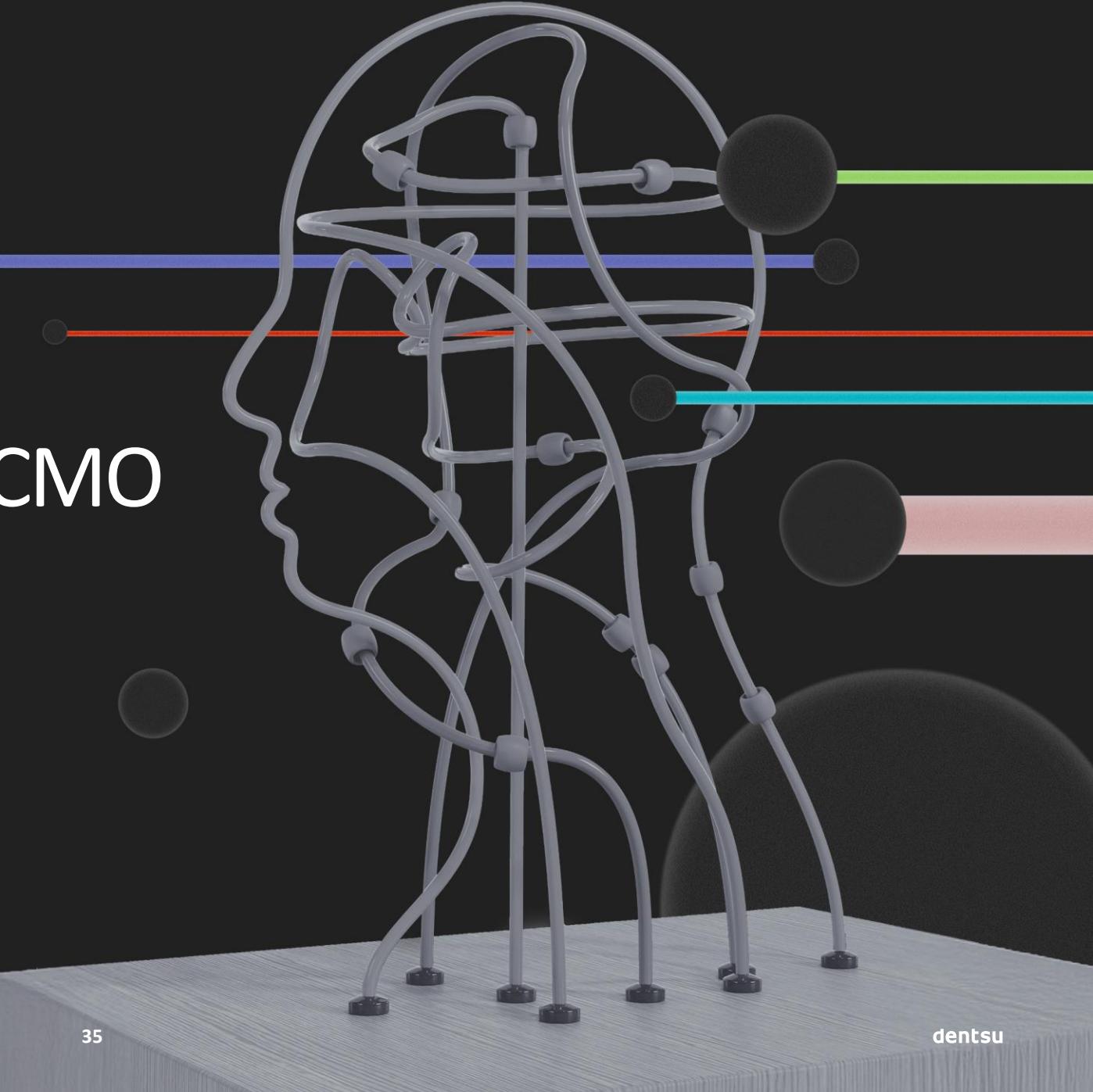
Media and advertising continue to be the bread and butter of CMOs' job responsibilities, but in legacy brands, this set of responsibilities grows and tends to include activities like thought leadership creation, sales/field enablement, and PR.

## CMOs FORECAST A RADICALLY TRANSFORMED BUSINESS LANDSCAPE AND PURSUE TRANSFORMATION INITIATIVES TO BETTER PREPARE THEIR ORGANIZATIONS TO THRIVE IN IT

One in three CMOs expect that 70% of their organizations' revenues five years from now will be driven by products, services, and businesses that are not yet part of their portfolio. This perspective is leading most organizations to pursue transformation efforts and evolve their business, such as developing new experiences, finding new ways to monetize their touchpoints, or evolving their commercial model.



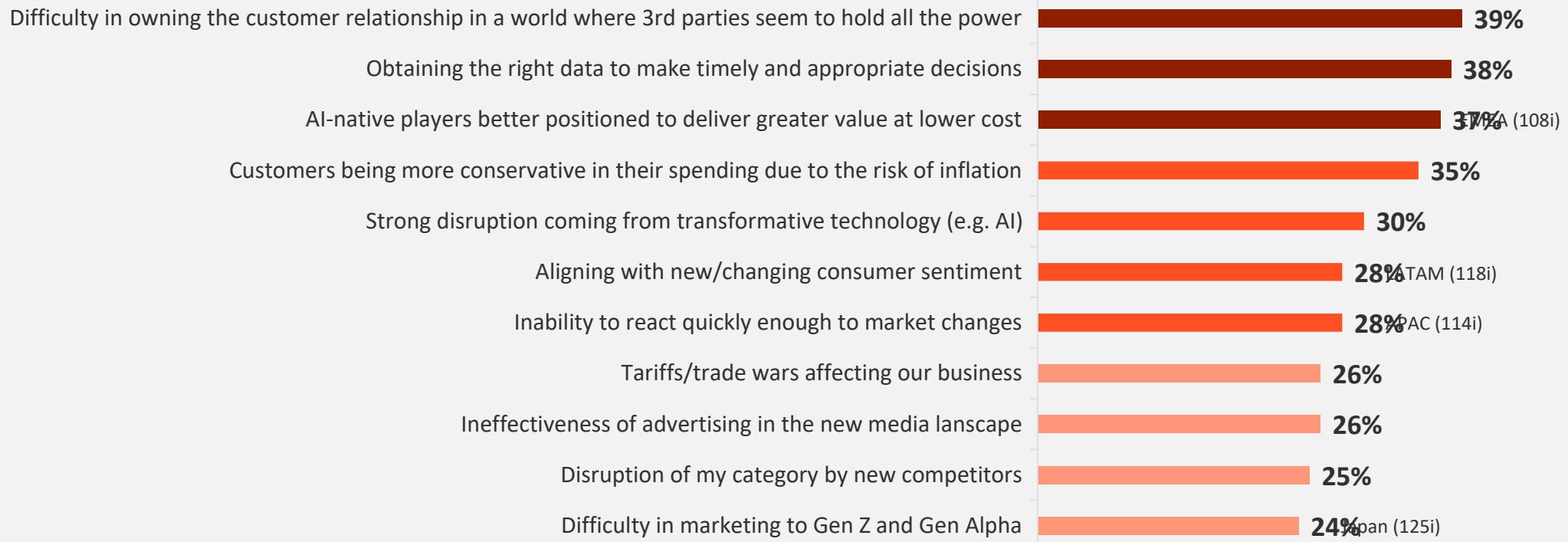
# HOW AI IS RESHAPING CMO STRATEGIES



# CMOs ARE PRIMARILY CONCERNED BY HOW THE LACK OF VISIBILITY INTO CONSUMER BEHAVIORS MIGHT HINDER BUSINESS AGILITY

AI-native competitors are also seen as a significant challenge emerging in the marketplace.

## EXTERNAL CHALLENGES CMOs EXPECT TO FACE IN THE NEXT 6-12 MONTHS



# AUTOMOTIVE, FINANCE, AND ENTERTAINMENT CMOs ARE MORE LIKELY TO BE WORRIED BY CONSUMERS' CONSERVATIVE SPENDING

While, overall, CMOs concur that the economy is going to get better, concerns over how consumer perceptions might inform future spending patterns are more pronounced among marketing leaders in these sectors. On the other hand, Food & Bev. and Luxury CMOs are significantly concerned by their reliance on intermediaries between their brands and their audiences.

## EXTERNAL CHALLENGES CMOs EXPECT TO FACE IN THE NEXT 6-12 MONTHS

### A U T O M O T I V E

Conservative spending (117i)  
Obtaining the right data (121i)

### E N E R G Y

Inability to react quickly (128i)  
Strong tech disruption (116i)

### F I N A N C E & I N S U R A N C E

Conservative spending (111i)  
Tariffs/trade (115i)

### F O O D & B E V E R A G E

Owning the customer relationship (138i)  
Tariffs/trade (115i)

### L U X U R Y

Owning the customer relationship (128i)  
Conservative spending (111i)

### M A N U F A C T U R I N G

Strong tech disruption (111i)

### M E D I A & E N T E R T A I N M E N T

Conservative spending (111i)  
AI-native players (108i)

### P R O F E S S I O N A L S E R V I C E S

Conservative spending (128i)  
Obtaining the right data (113i)

### R E T A I L

Inability to react quickly (118i)  
Owning the customer relationship (113i)

### T E L E C O M

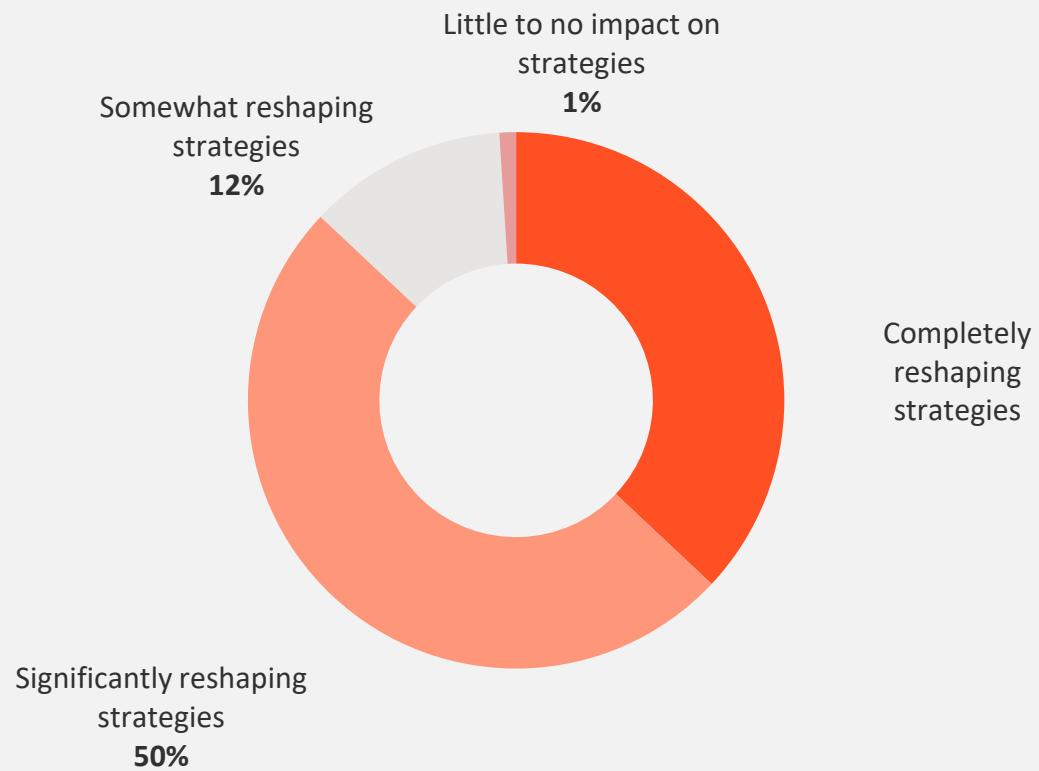
Difficulty in marketing to Gen Z & Alpha (116i)  
Owning the customer relationship (118i)



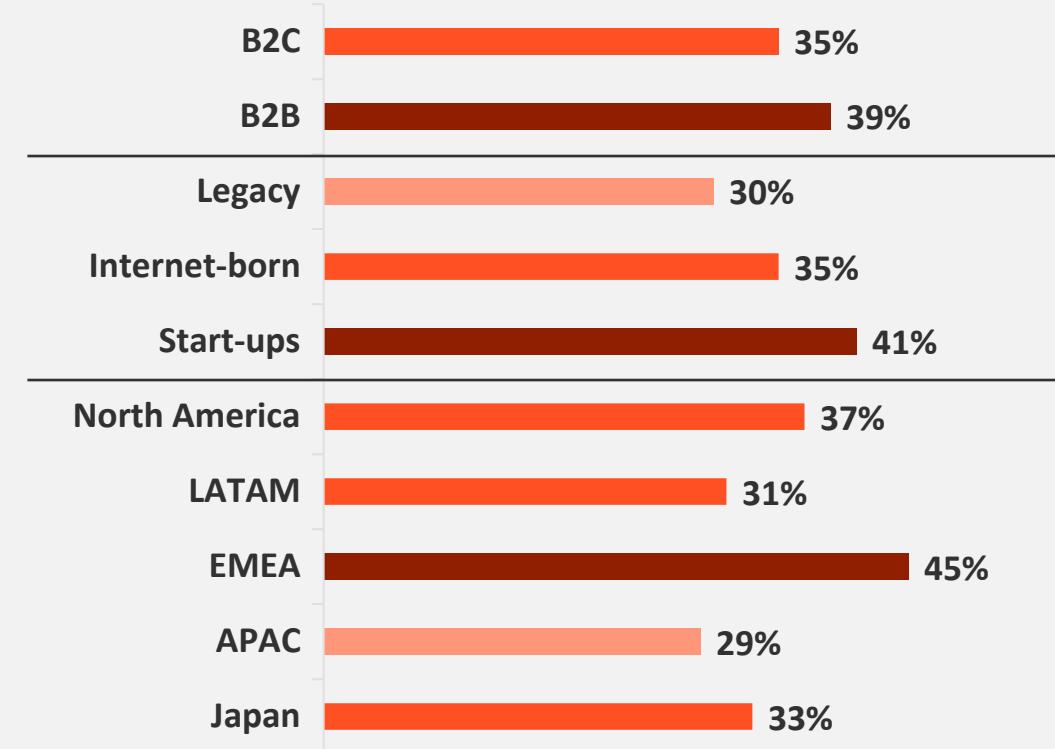
# AI IS HAVING A PROFOUND IMPACT ON CMO STRATEGIES

CMOs working in B2B organizations, start ups, and those operating in the EMEA marketplace are more likely to say the impact is prevalent.

## EXTENT TO WHICH AI CAPABILITIES ARE RESHAPING CMOs' G-T-M STRATEGIES



## AI CAPABILITIES ARE COMPLETELY RESHAPING OUR STRATEGIES



# TO MEET THEIR ORGANIZATIONS' OBJECTIVES, MOST CMOs PRIORITIZE INVESTMENT AND OPTIMIZATION STRATEGIES, RATHER THAN SAVING STRATEGIES

Across each strategy type (investment vs. optimization vs. saving), AI adoption is a preferred route. The increasing investment in digital customer experiences is also a key strategy being prioritized.

## STRATEGIES CMOs CONSIDER MOST IMPORTANT TO MEET BUSINESS GOALS

INVESTMENT STRATEGIES	OPTIMIZATION STRATEGIES	SAVING STRATEGIES			
Invest in AI to launch new prod./serv.	<b>50%</b>	AI adoption to increase mktg efficiency	<b>45%</b>	AI adoption to save through automation	<b>37%</b>
Increase investment in digital CX	<b>45%</b>	Shifting mktg spend to CRM/loyalty	<b>36%</b>	Conducting agency reviews to opt. value	<b>27%</b>
Increase budget for growth initiatives	<b>37%</b>	Optimizing prices for products/services	<b>34%</b>	Reducing investment in digital CX	<b>20%</b>
Increase budget for innovation initiat.	<b>37%</b>	Brand consolidation	<b>32%</b>	Reducing budget for innovation initiat.	<b>19%</b>
Increase investment in D-T-C	<b>37%</b>	Enabling differed payments	<b>32%</b>	Reducing investment in D-T-C	<b>18%</b>
Increase media spend	<b>34%</b>	Roll out cheaper alternatives to prod.	<b>32%</b>	Reducing budget for growth initiatives	<b>15%</b>
Hiring more talent	<b>26%</b>	Off-shoring more operational tasks	<b>22%</b>	Reducing headcount	<b>14%</b>
Pursuing in-housing strategies	<b>26%</b>	Re-negotiate contracts with vendors	<b>21%</b>	Reducing media spend	<b>14%</b>
<b>AVG. x INVESTMENT STRATEGIES</b>	<b>36%</b>	<b>AVG. x OPTIMIZATION STRATEGIES</b>	<b>32%</b>	<b>AVG. x SAVING STRATEGIES</b>	<b>20%</b>



# AI ADOPTION IS THE COMMON DENOMINATOR, BUT MOTIVATIONS TO USE IT VARY ACROSS THE BOARD

CMOs in Energy and Telecom are investing in AI to develop new offerings, while those working in Professional Services are looking to either create new efficiencies or generate savings.

## WHY DIFFERENT CMOs ARE PRIORITIZING AI ADOPTION

**INCREASE INVESTMENT IN AI CAPABILITIES TO LAUNCH NEW PRODUCTS & SERVICES**

**PRIORITIZE AI ADOPTION TO ENHANCE MARKETING EFFECTIVENESS & EFFICIENCY**

**PRIORITIZE AI ADOPTION TO DRIVE SAVINGS THROUGH AUTOMATION**

REGION

APAC (114i); Japan (108i)

LATAM (107i)

APAC (119i)

INDUSTRY

Energy (112i); Telecom (120i)

Food & Beverage (109i)  
Professional Services (111i)

Professional Services (111i)  
Retail (105i)



# ALMOST HALF OF CMOs LACK CONFIDENCE IN THEIR ORGANIZATION'S ABILITY TO IMPLEMENT SOME OF THE STRATEGIES THEY DEEM MOST IMPORTANT

CMOs report being more confident when it comes to AI adoption as a measure to enhance effectiveness and generate savings, but they seem less confident when it comes to generating net new value out of AI capabilities.

## CMOs' CONFIDENCE IN THEIR ORGs' ABILITY TO IMPLEMENT THEIR TOP 10 STRATEGIES



## IN A VERY DYNAMIC ENVIRONMENT, CMOs ARE FACING DIFFERENT CHALLENGES DEPENDING ON THE CONTEXT IN WHICH THEIR BRAND OPERATES

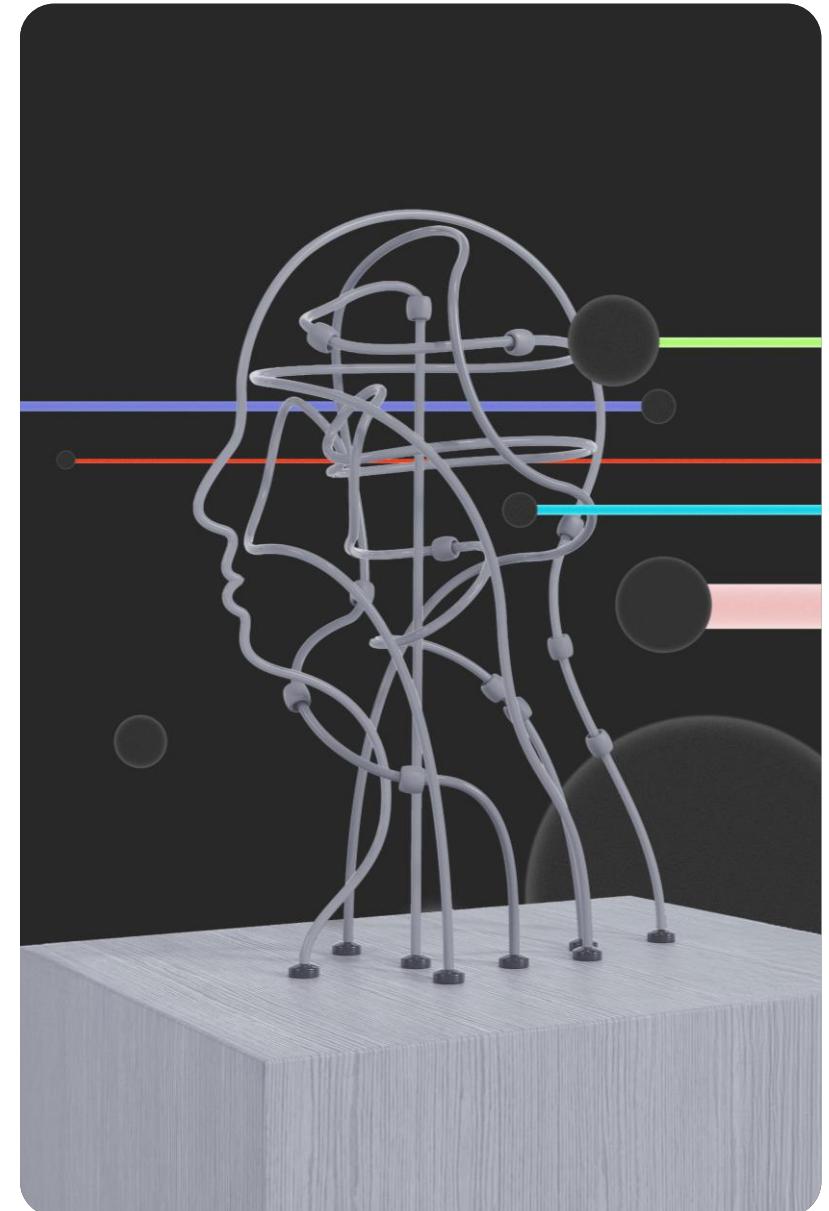
While issues hindering business agility, such as lack of control over the customer relationship or difficulty in obtaining actionable data, keep most CMOs up at night, we see nuances emanating from specific industry contexts. Automotive, Finance, and Entertainment CMOs over-index on being concerned that consumers' spending behaviors might become more conservative due to perceptions surrounding the economic environment.

## AI IS HAVING A PROFOUND IMPACT ON ALL CMOs' STRATEGIES REGARDLESS OF THEIR SPECIFIC APPROACH AND ITS ADOPTION IS THE COMMON DENOMINATOR WITHIN THEM

Nine in ten CMOs say that emerging AI capabilities are impacting their strategies. Looking at the next six to twelve months, CMOs tend to prioritize investment and optimization strategies, rather than saving strategies. Regardless, AI adoption is seen as a key enabler for all these approaches.

## THE DESIRE TO LEAN INTO UNCHARTED TERRITORIES IS LIKELY LEADING CMOs TO SEEK SUPPORT OUTSIDE THEIR ORGANIZATION

Almost half of CMOs lack confidence in their organization's ability to implement some of the strategies they deem most important. This is particularly true when it comes to deploying AI capabilities to launch new products, services, and experiences, whereas CMO confidence grows when it comes to adopting AI to do the things they used to do, more efficiently or at a lower cost.



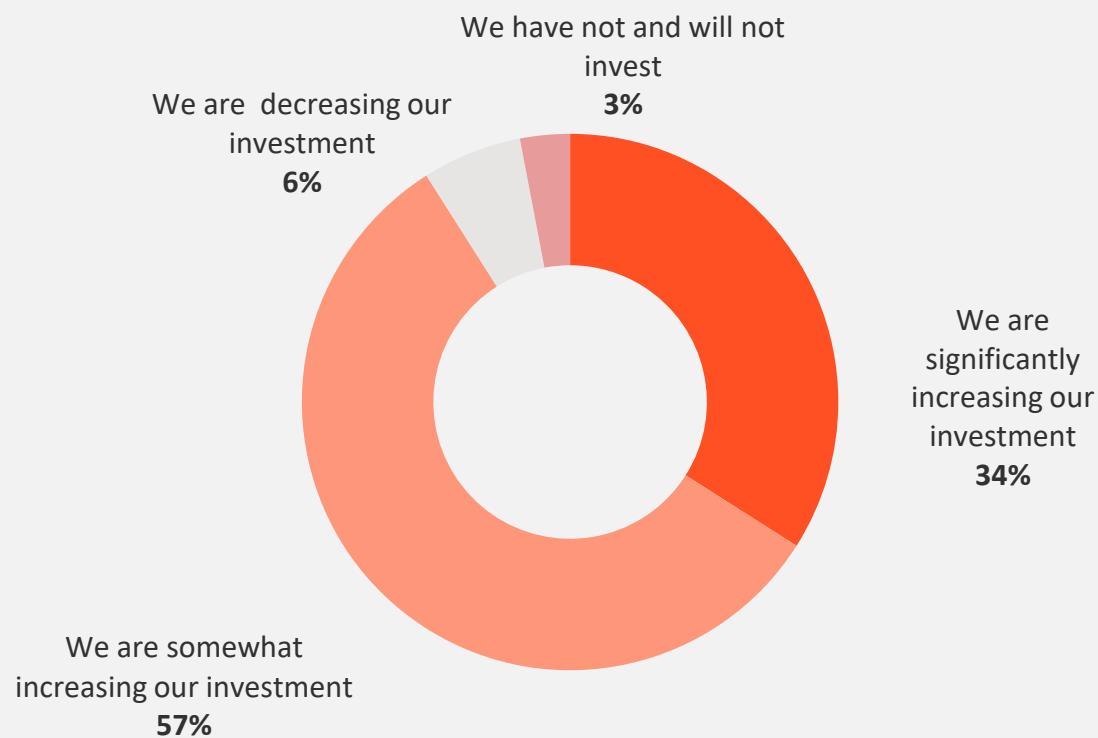
# PARTNERING WITH SPORTS & ENTERTAINMENT IP



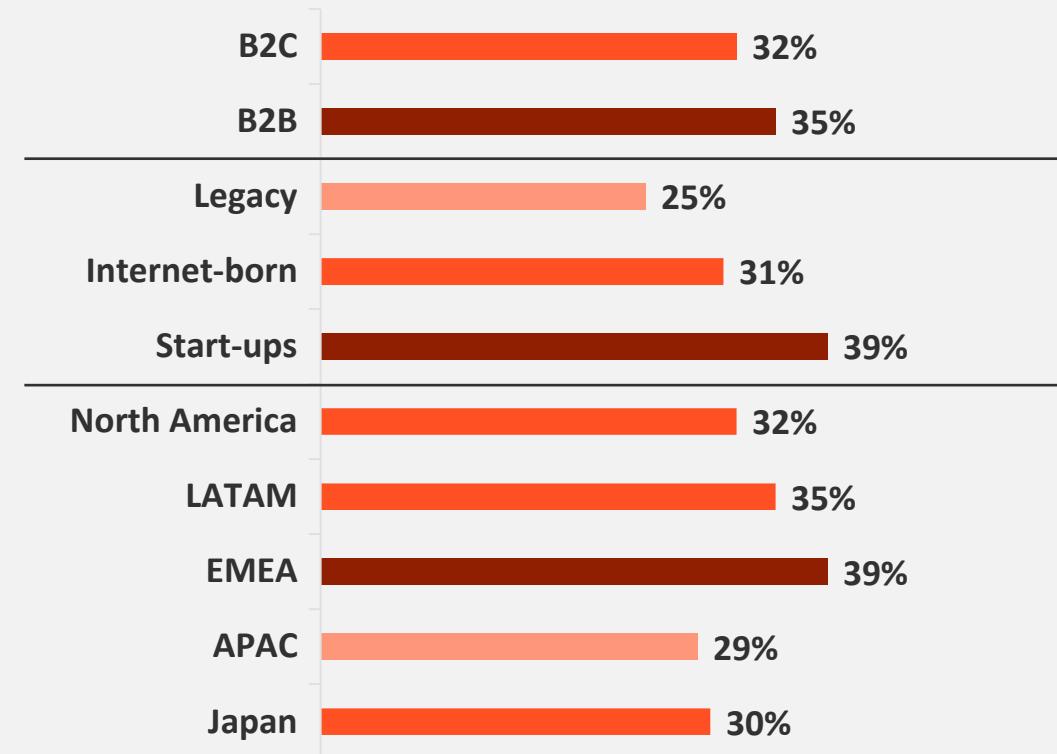
# ENTERTAINMENT IP PARTNERSHIP ARE INCREASINGLY BECOMING A STRATEGIC INVESTMENT FOR BRANDS

9 in 10 CMOs are increasing their investment and 1 in 3 is doing so significantly. EMEA CMOs are most likely to lean in.

## HOW CMO INVESTMENT IN PARTNERSHIPS WITH ENTERTAINMENT IP IS EVOLVING



## WE ARE SIGNIFICANTLY INCREASING INVESTMENTS IN ENTERTAINMENT IP



# CMOs ARE PURSUING A VARIETY OF STRATEGIES TO LEVERAGE THE POPULARITY OF SPORTS

While ad placements during international and regional events continue to be the most commonplace solution, new approaches like the production of original sports docuseries are not that much behind among preferences.

## CMO INVESTMENT IN SPORTS ENTERTAINMENT



# THERE ARE REGIONAL NUANCES IN TERMS OF HOW CMOs APPROACH SPORTS ENTERTAINMENT OPPORTUNITIES

CMOs in North America and Japan over-index on sponsoring professional teams, while LATAM and EMEA CMOs are more likely to rely on producing documentaries and events - possibly because these regions are more balkanized when it comes to sports fandom.

## CMO INVESTMENT IN SPORTS ENTERTAINMENT

### NORTH AMERICA

Sponsoring professional sports teams (106i)

### LATAM

Ad placements during in-region sports events (112i)  
Original sports documentary content (111i)

### EMEA

Organizing/sponsoring esports tournaments (106i)

### APAC

*No significant over-indexation*

### JAPAN

Sponsoring professional sports teams (106i)



# INDUSTRY SECTORS INFLUENCE HOW BRANDS ARE INTEGRATING INTO SPORTS ENTERTAINMENT

CMOs in consumer product categories like Food and Luxury are more likely to lean into docuseries productions to associate brands with emotional storytelling, whereas CMOs in utility sectors like Energy turn to ad placements during major events to enhance brand awareness.

## CMO INVESTMENT IN SPORTS ENTERTAINMENT

### A U T O M O T I V E

Sponsoring pro teams (106i)

### E N E R G Y

Ads during in-region sports events (122i)

Ads during international sports events (113i)

### F I N A N C E & I N S U R A N C E

*No significant over-indexation*

### F O O D & B E V E R A G E

Sports doc productions (105i)

### L U X U R Y

Sports doc productions (116i)

Ads during in-region sports events (110i)

### M A N U F A C T U R I N G

*No significant over-indexation*

### M E D I A & E N T E R T A I N M E N T

Sponsoring pro teams (106i)

### P R O F E S S I O N A L S E R V I C E S

*No significant over-indexation*

### R E T A I L

Engaging pro athletes as spokespeople (108i)

### T E L E C O M

Engaging pro athletes as spokespeople (105i)



## CMOs CONCUR WITH CONSUMERS THAT THE APPEAL OF CROSS-CULTURAL ENTERTAINMENT IP IS GROWING

This is manifesting in the increasing popularity of genres like anime (last summer, *Demon Slayer Infinity Castle* outperformed *Superman* and *Fantastic Four: First Steps* in the global box office) and in viral global hits like *K-pop Demon Hunters*.

AUDIENCES INCREASINGLY ENJOY ENGAGING WITH ENTERTAINMENT AND CONTENT  
FEATURING COUNTRIES AND CULTURES OTHER THAN THEIR OWN

CMOs

47%

51%

2%

STRONGLY AGREE

SOMEWHAT AGREE

DISAGREE

Consumers

31%

47%

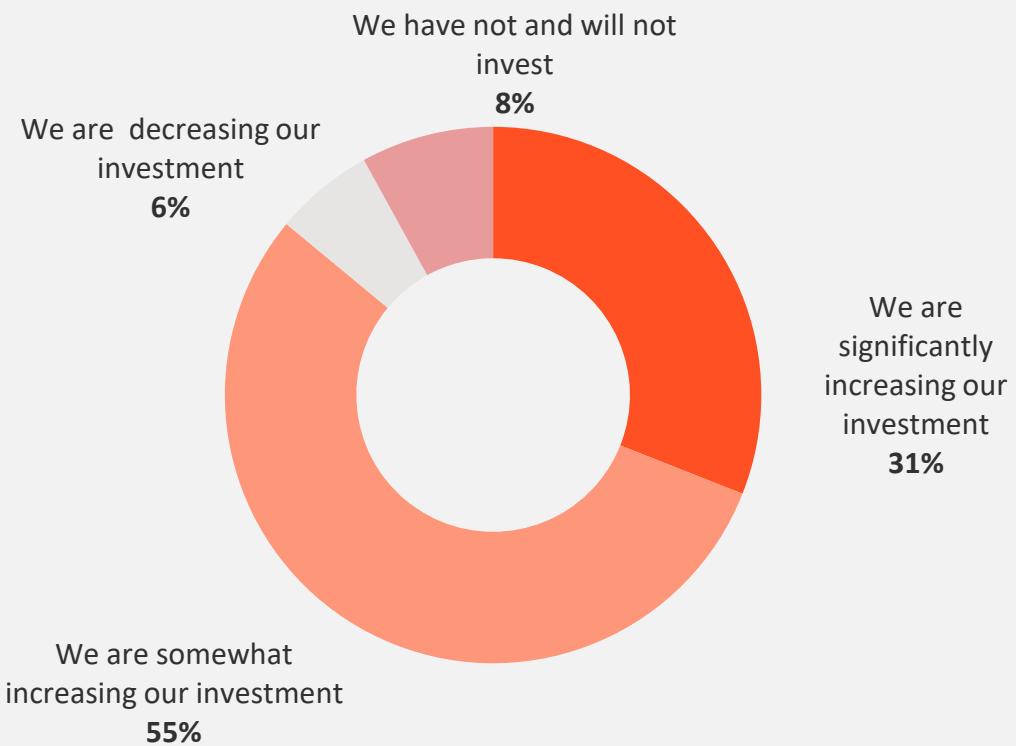
22%



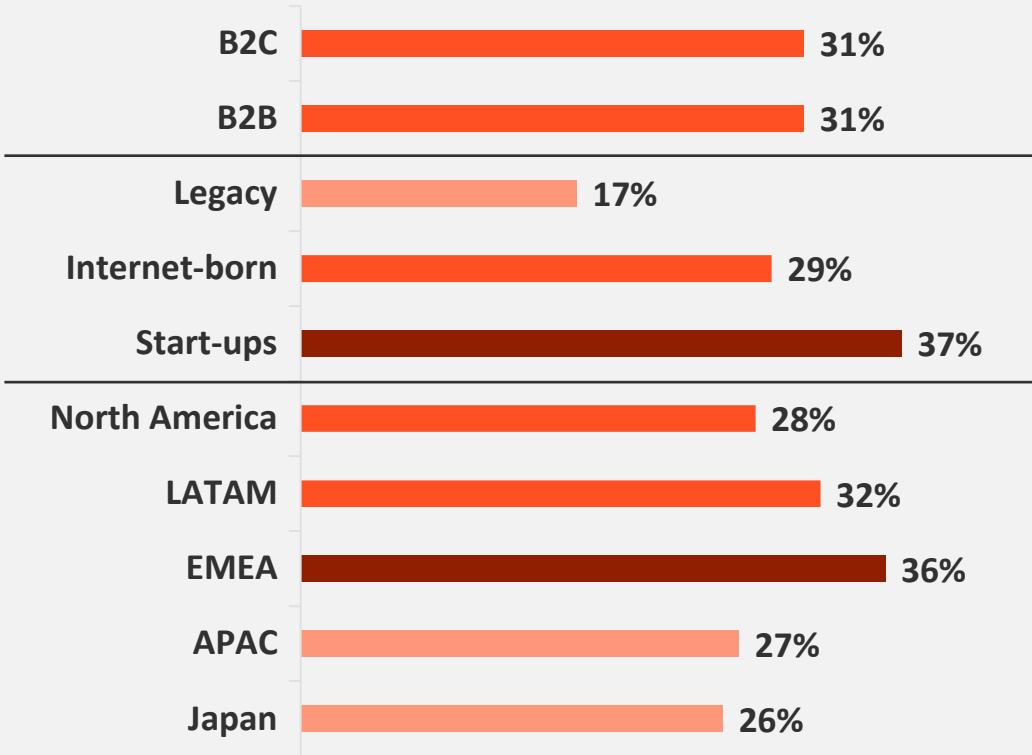
# THUS, 8 IN 10 CMOs ARE INVESTING IN PARTNERSHIPS WITH ANIME IP

[Our global research](#) shows that 3 in 10 global consumers are watching anime weekly, and marketers are responding to this. CMOs in organizations that are less than 10 years old are significantly increasing their investment to get their brands noticed.

## HOW CMO INVESTMENT IN PARTNERSHIPS WITH ANIME IP (E.G., DRAGON BALL Z, ATTACK ON TITAN, ETC.) IS EVOLVING



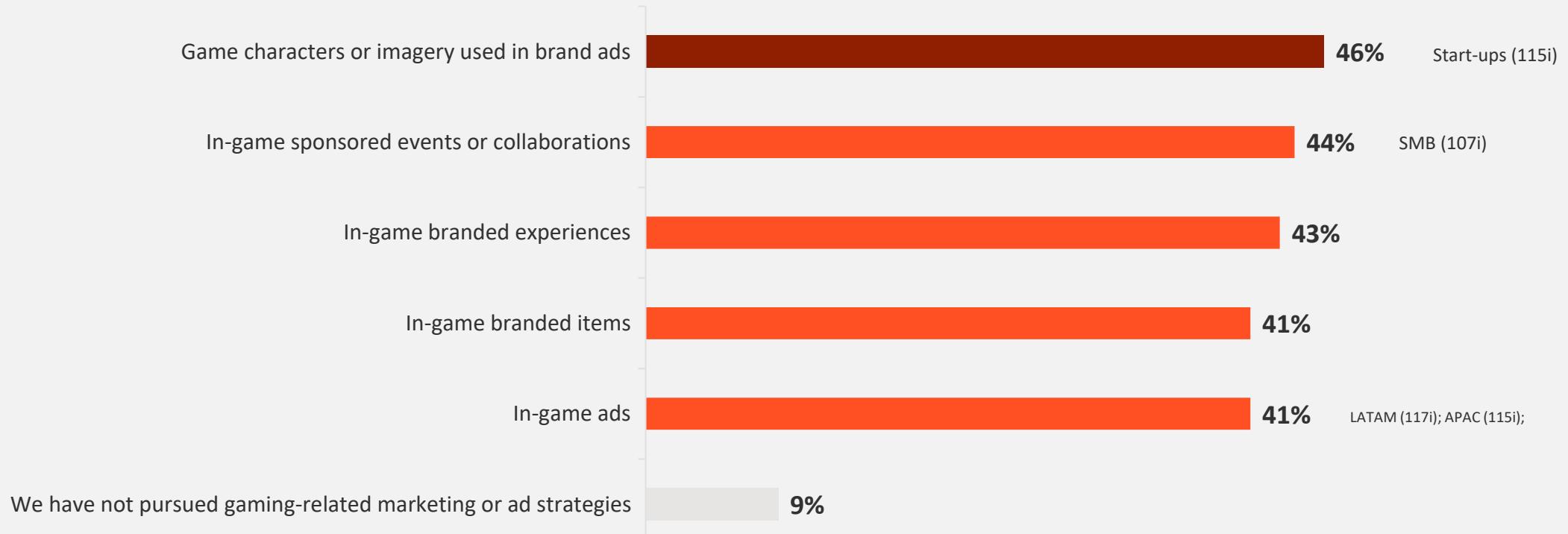
## WE ARE SIGNIFICANTLY INCREASING INVESTMENTS IN ANIME IP



# LIKEWISE, GAMING IS NOW BEING SEEN AS A KEY SPACE IN WHICH TO REACH CONSUMERS

[Our research](#) shows that half of global consumers play video games weekly and that most gamers' opinions of brands improve when gaming partnerships are pursued. Only a minority of CMOs report not pursuing any type of tie into gaming experiences or IP.

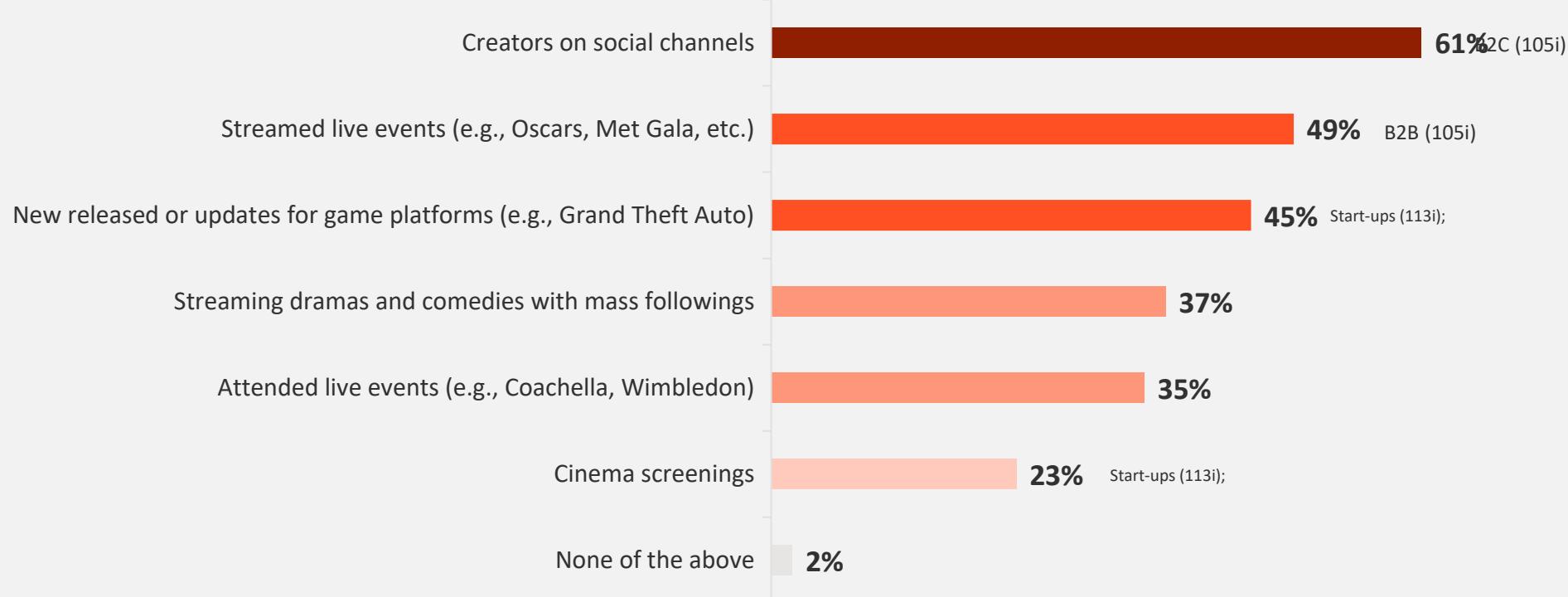
## STRATEGIES PURSUED BY CMOs TO REACH CONSUMERS VIA GAMING IN THE LAST 12 MONTHS



# CMOs UNDERSTAND THAT PARTNERSHIPS WITH ENTERTAINMENT IP ARE ELEVATED BY CREATORS WHO ARE SEEN AS TRUSTED SOURCES BY THE FANS

Influencer marketing is a preferred channel by CMOs, and content creators are relied upon for their ability to legitimize brands' intersections with culture.

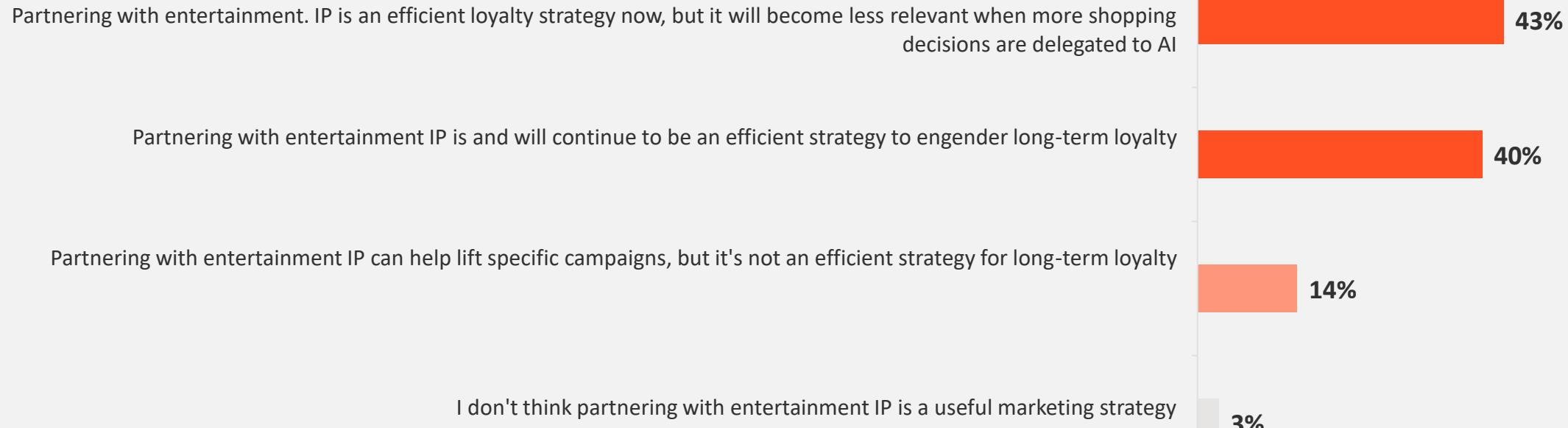
## ENTERTAINMENT FORMATS AND CHANNELS PRIORITIZED BY CMOs



## CMOs ARE DIVIDED ON WHETHER ENTERTAINMENT IP AS A MEANS FOR BRANDS TO ENGENDER LOYALTY WILL BE AFFECTED BY INCREASING RELIANCE ON AI OR NOT

4 in 10 CMOs think entertainment IP partnerships will continue to be an efficient way to engender loyalty, and more or less the same share of CMOs believes that they will become less relevant as consumers delegate shopping decisions to AI agents.

### CMO VIEWS ON ENTERTAINMENT IP AND BRAND LOYALTY



## CMOs ARE INCREASING THEIR INVESTMENT IN A VARIETY OF ENTERTAINMENT PARTNERSHIP OPPORTUNITIES TO STRENGTHEN THEIR CONNECTION WITH CONSUMERS

Investment in entertainment IP and, specifically in anime, is significantly increasing. On the lead up to the 2026 FIFA World Cup, CMOs are also pursuing a variety of strategies to leverage the popularity of sports according to their business context. CMOs in consumer product categories like Food and Luxury are more likely to lean into docuseries productions to associate brands with emotional storytelling, whereas CMOs in utility sectors like Energy turn to ad placements during major events to enhance brand awareness.

## IN ADDITION TO IP PARTNERSHIPS, CMOs ARE MAKING SURE THEIR BRANDS ARE PRESENT IN THE SPACES AND COMMUNITIES WHERE ENTERTAINMENT IS ADAPTED AND DISCUSSED

Gaming is seen as a key space in which to reach consumers, and activations on creators' social channels are being prioritized, as influencers are relied upon for their ability to legitimize brands' connection with culture. Leslie Headland, showrunner of the cancelled Disney+ show *The Acolyte*, recently told the [AV Club](#), "The [online creator] content being made about *Star Wars* will ultimately be more culturally impactful than actual *Star Wars*."

## CMOs ARE DIVIDED ON WHETHER OR NOT ENTERTAINMENT IP AS A MEANS FOR BRANDS TO ENGENDER LOYALTY WILL BE AFFECTED BY INCREASING RELIANCE ON AI

Four in ten CMOs think entertainment IP partnerships will continue to be an efficient way to engender loyalty, and more or less the same share of CMOs believe that they will become less relevant as consumers delegate shopping decisions to AI agents.



# MEDIA TRANSFORMATION IN THE ALGORITHMIC ERA



# MEDIA IS THE CONNECTIVE TISSUE OF THE ALGORITHMIC ERA

**In the Algorithmic Era, media is more than just a channel, it is the most powerful growth engine CMOs can rely on today and a cornerstone of any transformation agenda.**

In 2026, global advertising spend is projected to surpass \$1 trillion for the first time, as brands compete to capture audience attention leverage media's expanded capabilities. Every touchpoint is now a limitless opportunity to connect, shop, share, experiment and belong whenever and with whomever we want.

CMOs understand that as media and technology landscapes continue to evolve fast, simply repeating last year's marketing plan is likely to lead to missed opportunities to better address their audiences' human truths, missed opportunities to harness data in new ways for deeper insights, and missed opportunities to explore white spaces that help their brands stand out from competition.

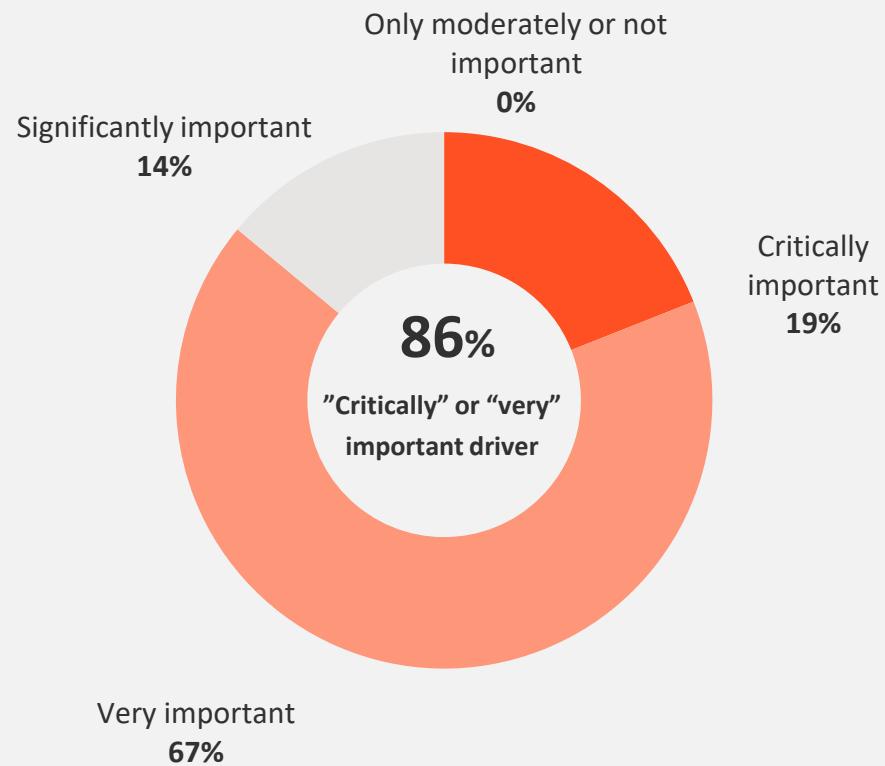
As CMOs enter a new year marked by major sporting events (e.g., the Winter Olympics and FIFA World Cup), global cultural moments (e.g., the release of GTA VI), and rapid innovation in fast-growing areas (e.g., AI-Augmented search, LLM assistants, business messaging), the following pages explore their expectations, plans, and priorities for media.



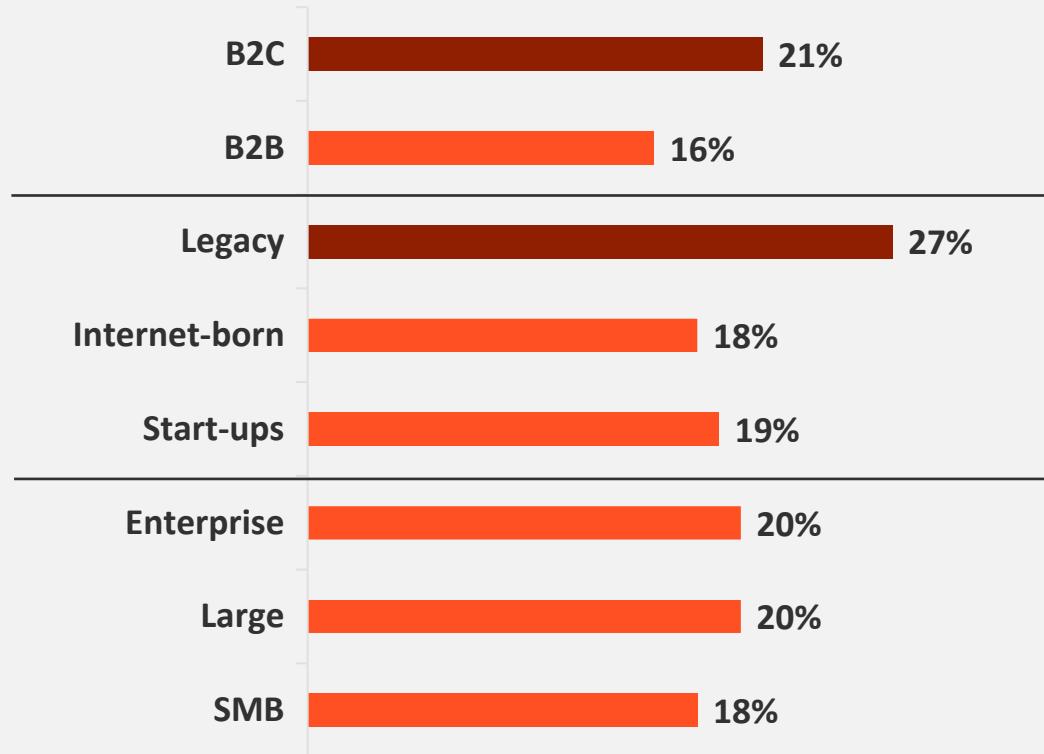
# MOST CMOs CONCUR THAT MEDIA IS A STRATEGIC LEVER TO DRIVE GROWTH FOR THEIR BUSINESS

CMOs in legacy brands are most likely to consider media as critical.

## CMO VIEWS ON THE IMPORTANCE OF MEDIA AS A DRIVER FOR BUSINESS GROWTH



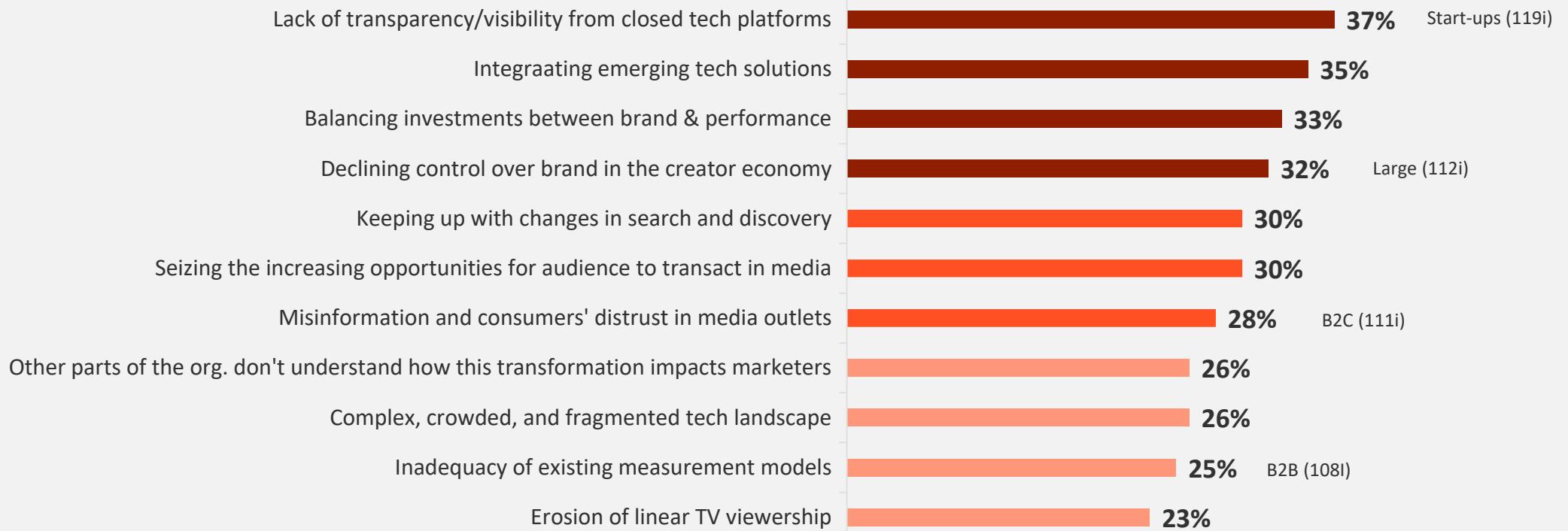
## MEDIA IS A CRITICAL DRIVER FOR BUSINESS GROWTH



# LACK OF ACCESS TO AND VISIBILITY INTO DATA AND INTEGRATING EMERGING TECH LIKE AI ARE CMOs' BIGGEST MEDIA TRANSFORMATION CONCERNS

The need to balance investments between performance and brand, and how to retain control over the latter in the creator economy, are also challenges for a large share of CMOs.

## MEDIA TRANSFORMATION CHALLENGES



# WHILE THE LACK OF VISIBILITY IN CLOSED PLATFORMS IS FEARED GLOBALLY, THERE ARE REGIONAL NUANCES WHEN IT COMES TO MEDIA TRANSFORMATION CHALLENGES

CMOs in North America are more likely to lament the inadequacy of existing measurement models, while LATAM and EMEA CMOs feel that other parts of the business don't fully understand the impact media transformation holds for marketers.

## MEDIA TRANSFORMATION CHALLENGES

### NORTH AMERICA

Inadequacy of existing measurement models (112i)

### LATAM

Other parts of the org. don't understand how this trans.  
Impacts mktg. (115i)  
Integrating emerging tech sol. (106i)

### EMEA

Other parts of the org. don't understand how this trans.  
Impacts mktg. (108i)

### APAC

Keeping up with changes in search and discovery (116i)  
Integrating emerging tech sol. (114i)

### JAPAN

Erosion of linear TV viewership (150)  
Balancing investment between brand performance (115i)



# CMOs IN LUXURY AND MANUFACTURING ARE STRUGGLING TO KEEP UP WITH EMERGING TECH SOLUTIONS INTEGRATION

On the other hand, Food & Beverage and Telecom CMOs are pondering how to balance their investments in brand vs. performance.

## MEDIA TRANSFORMATION CHALLENGES

### AUTOMOTIVE

Other parts of the org. don't understand how this trans. impacts mktg. (115i)  
Inadequacy of existing measurement models (112i)

### ENERGY

Lack of transparency from closed platforms (138i)  
Declining control over brand in creator economy (125i)

### FINANCE & INSURANCE

Complex, crowded, fragmented tech landscape (115i)

### FOOD & BEVERAGE

Balancing investment between brand & performance (130i)  
Lack of transparency from closed tech platforms (124i)

### LUXURY

Integrating emerging tech solutions (126i)  
Seizing opportunities for audiences to transact in media (123i)

### MANUFACTURING

Integrating emerging tech solutions (106i)

### MEDIA & ENTERTAINMENT

Seizing opportunities for audiences to transact in media (110i)

### PROFESSIONAL SERVICES

Declining control over brand in creator economy (139i)  
Integrating emerging tech solutions (117i)

### RETAIL

*No significant over-indexation*

### TELECOM

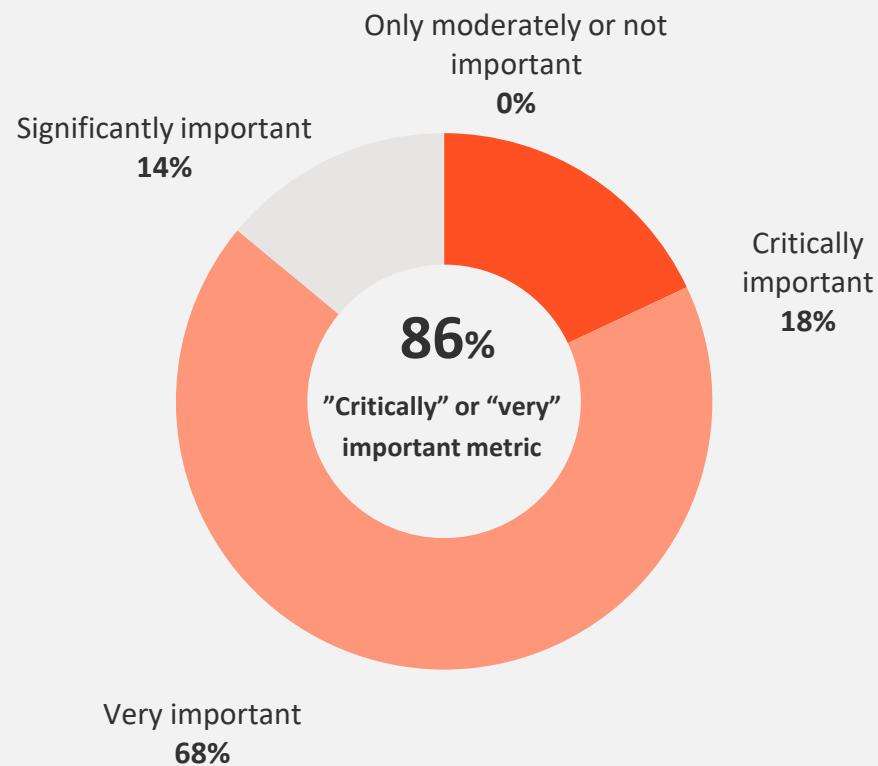
Misinformation and consumers' distrust in media outlets (118i)  
Balancing investments between brand & performance (109i)



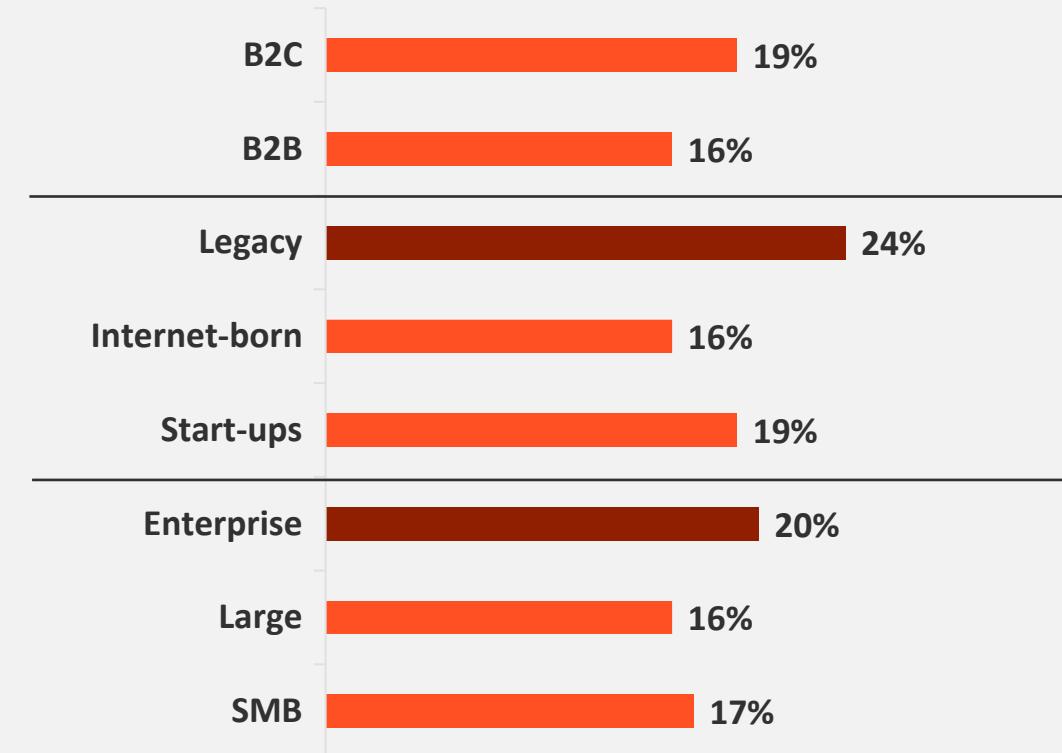
# MOST CMOs AGREE THAT ATTENTION IS A VERY IMPORTANT METRIC TO DETERMINE THE EFFICACY OF MEDIA-DRIVEN INITIATIVES

CMOs in enterprise companies and organizations that have been in the market for more than 30 years are more likely to consider media critical.

## CMO VIEWS ON THE IMPORTANCE OF USING ATTENTION AS A METRIC FOR MEDIA ACTIVITY



## THE USE OF ATTENTION AS A METRIC OF CRITICAL

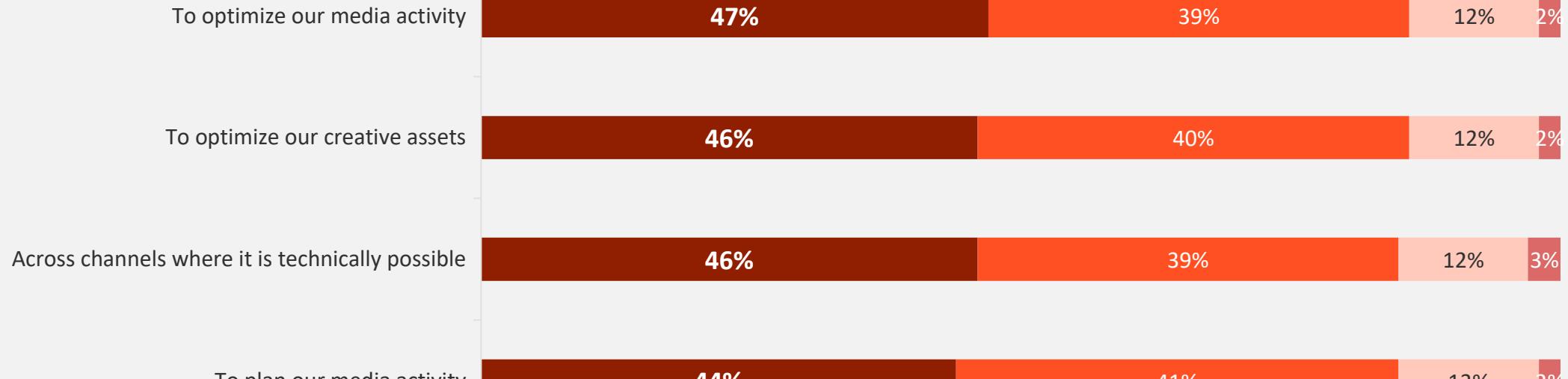


# IN FACT, THE VAST MAJORITY OF ORGANIZATIONS HAS ALREADY FULLY IMPLEMENTED ATTENTION, OR IS ACTIVELY TESTING PILOTS, TO EMBED IT IN CORE MEDIA ACTIVITIES

The share of organizations not planning to use media going forward is extremely limited.

## TO WHAT EXTENT ORGs ARE USING ATTENTION AS A METRIC IN KEY MEDIA ACTIVITIES

■ Fully part of our strategy ■ Running early pilots ■ Not using but intend to in the next 12 months ■ Not using and not planning to



# CMOs IN NORTH AMERICA APPEAR TO BE AHEAD WHEN IT COMES TO THE USE OF ATTENTION TO OPTIMIZE HOW AND WHAT THEY ARE DELIVERING THROUGH MEDIA

LATAM CMOs over-index in running pilots leveraging attention to optimize creative, whereas EMEA CMOs over-index on running pilots to plan their media activity.

ATTENTION AS A METRIC IS FULLY PART OF OUR STRATEGY  
IN THIS AREA OF MEDIA

## **NORTH AMERICA**

- To optimize our media activity (110)
- To optimize our creative assets (110)

## **LATAM**

- To optimize our media activity (125)
- To plan our media activity (125)

## **APAC**

- To plan media activity (125i)

WE ARE RUNNING PILOTS WITH ATTENTION AS A METRIC IN  
THIS AREA OF MEDIA

## **LATAM**

- To optimize our creative (112)

## **EMEA**

- To optimize our media activity (106)
- To plan our media activity (106)

# CMOs' FOCUS IS QUITE BALANCED BETWEEN BRAND AND PERFORMANCE, BUT THERE IS A NOTICEABLE PRIORITIZATION IN FAVOR OF THE FORMER

In fact, preferences for investments in brand have grown compared to last year. CMOs in product-oriented industry sectors (e.g., Automotive, Manufacturing) are more likely to favor brand, while those working in service-oriented industries (e.g., Financial Services, Telecom) over-index on prioritizing performance.

## MEDIA INVESTMENT FOCUS SPLIT

MORE INVESTMENT IN LONG-TERM  
BRAND GROWTH ACTIVITY

**60%**

*vs. 56% in 2024*

Legacy (105i)

APAC (108i)

Automotive (118i); Manufacturing (107i)

MORE INVESTMENT IN SHORT-TERM  
PERFORMANCE ACTIVITY

**40%**

*vs. 44% in 2024*

Start ups (115i)

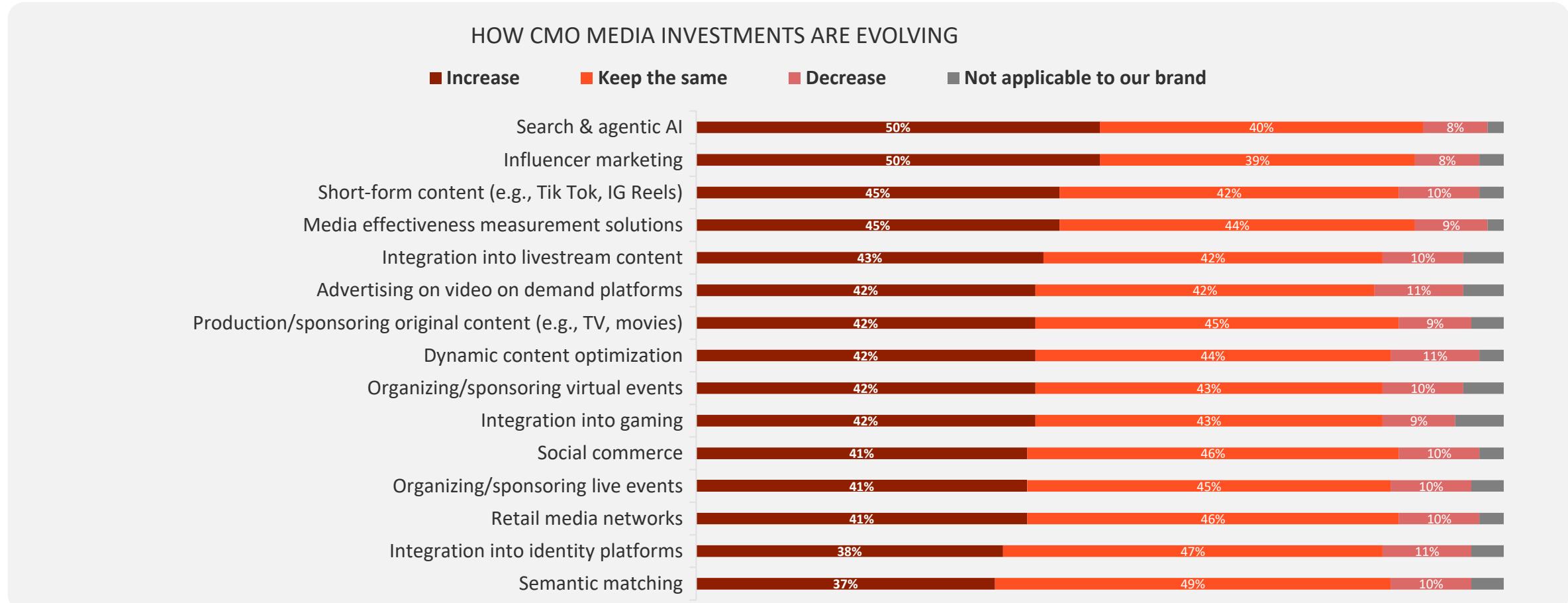
EMEA (115i)

Finance & Insurance (120i); Telecom (112i)



# INVESTMENT PRIORITIES SHOW THAT CMOs UNDERSTAND HOW AI AND INFLUENCERS ARE INCREASINGLY IMPACTING PURCHASING DECISIONS

Consumers are turning to bots and creators for help when making complex buying decisions, and CMOs are thus prioritizing these channels when allocating their media investments.



# APAC CMOs OVER-INDEX ON PRIORITIZING INVESTMENTS IN RETAIL MEDIA NETWORKS, WHILE LATAM CMOs ARE LEANING INTO GAMING INTEGRATIONS THE MOST

EMEA is leading the way when it comes to investing in semantic matching.

## WE ARE INCREASING OUR INVESTMENT IN THIS

### NORTH AMERICA

Media effectiveness  
measurement solutions (106i)

### LATAM

Integration into gaming (111i)

### EMEA

Semantic matching (112i)

### APAC

Retail media networks (114i)

### JAPAN

*No significant over-indexation*



# ENTERTAINMENT CMOs ARE LEANING INTO THE BOOST THAT GAMING CAN PROVIDE TO THEIR IP

Our [research study](#) shows that consumers appreciate when entertainment IP gets adapted into gaming and vice versa, and CMOs operating in this sector seem to be responding to this trend.

## WE ARE INCREASING OUR INVESTMENT IN THIS

### AUTOMOTIVE

Semantic matching (133i)  
Dynamic content optimization (133i)

### ENERGY

Integrating into identity platforms (133i)

### FINANCE & INSURANCE

*No significant over-indexation*

### FOOD & BEVERAGE

Retail media networks (120i)

### LUXURY

Social commerce (116i)

### MANUFACTURING

Search and agentic AI (123i)

### MEDIA & ENTERTAINMENT

Integration into gaming (129i)

### PROFESSIONAL SERVICES

Production/sponsorship of original content (120i)

### RETAIL

Live events (110i)  
Virtual events (110i)

### TELECOM

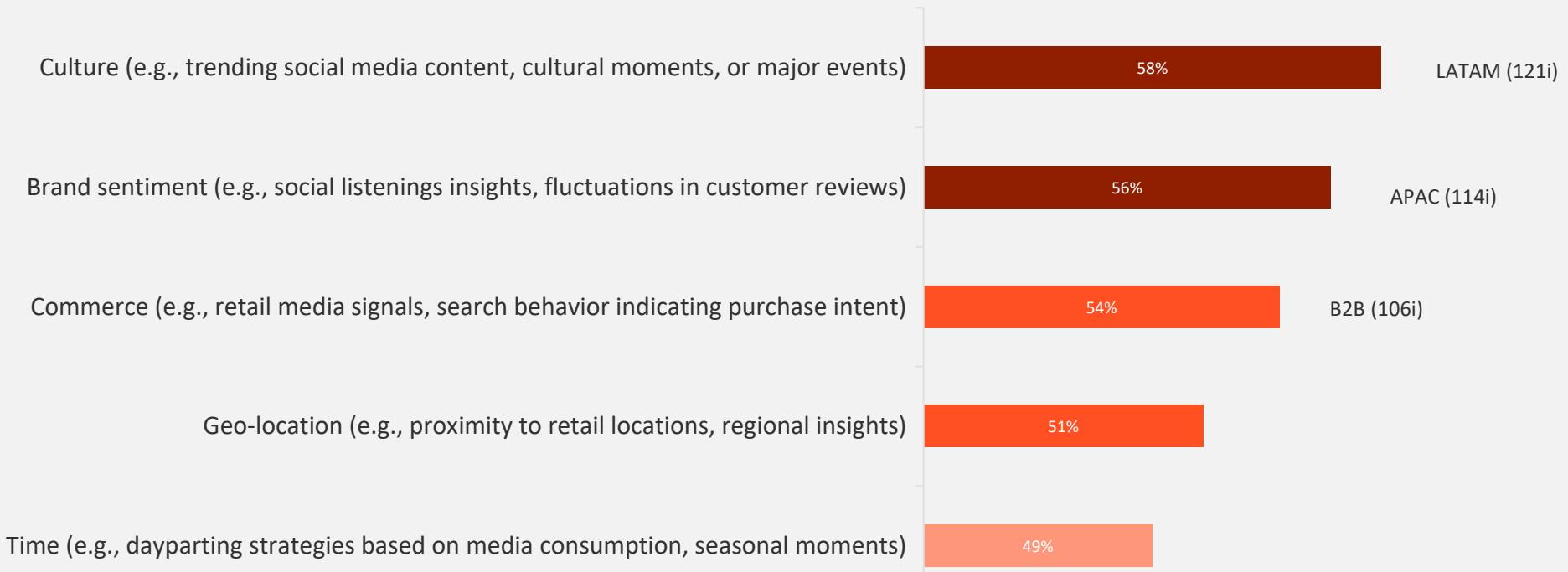
Search and agentic AI (150i)



# CMOs ARE LEVERAGING CONTEXTUAL SIGNALS TO RESPOND TO CULTURE MORE RAPIDLY AND TRACK BRAND SENTIMENT MORE THOROUGHLY

B2B organizations over-index on leaning on commerce-oriented contextual signals as they attempt to understand how purchasing decisions are shaping up.

## EMERGING CONTEXTUAL SIGNALS IN SCALED MEDIA PLATFORMS LEVERAGED BY CMOs



# CONSUMER PRODUCT SECTORS LIKE FOOD AND LUXURY OVER-INDEX ON GEO-LOCATION AND CULTURE SIGNALS

Unsurprisingly, Retail CMOs lean more heavily on commerce signals.

## EMERGING CONTEXTUAL SIGNALS IN SCALED MEDIA PLATFORMS LEVERAGED BY CMOs

### AUTOMOTIVE

Time (110i)

### ENERGY

Brand sentiment (112i)

### FINANCE & INSURANCE

Brand sentiment (107i)

### FOOD & BEVERAGE

Geo-location (116i)  
Culture (109i)

### LUXURY

Geo-location (120i)  
Culture (114i)

### MANUFACTURING

Commerce (111i)

### MEDIA & ENTERTAINMENT

Culture (110i)

### PROFESSIONAL SERVICES

*No significant over-indexation*

### RETAIL

Commerce (105i)

### TELECOM

Time (104i)



# CMOs ARE STRUGGLING TO ASSESS AND MEASURE THE EFFICACY OF THE NEW VIDEO MARKETPLACE

However, the share of CMOs reporting they only see opportunity in this space is growing compared to last year.

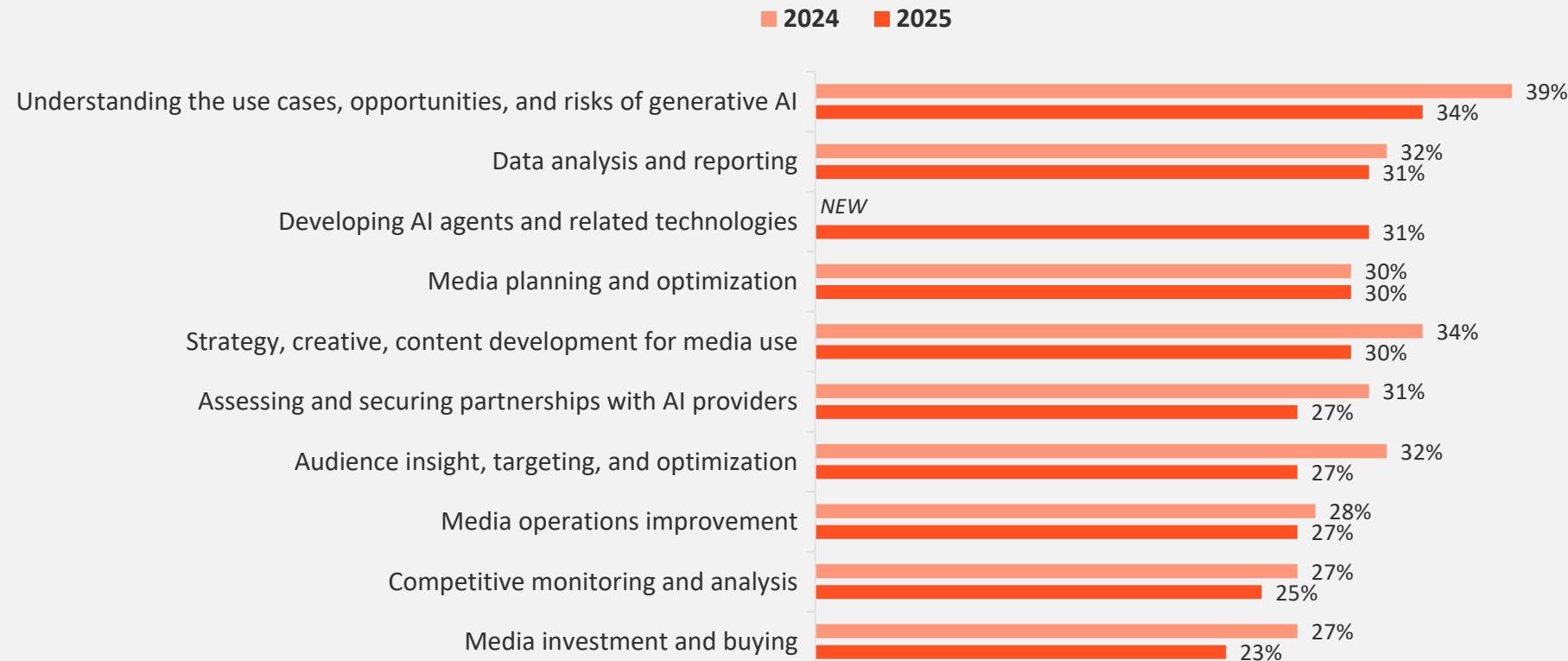
## CHALLENGES IN THE NEW VIDEO MARKETPLACE THAT CONCERN CMOs



# WHILE CMOs SEE AI HAVING BROAD APPLICABILITY WHEN IT COMES TO MEDIA, THEY ALSO FEEL THAT MUCH OF ITS POTENTIAL AND RISKS ARE YET TO BE EXPLORED

Gaining a greater understanding continues to be indicated as the top focus area for the next 12 months. The development of AI agents is quickly becoming a top investment priority.

## CMO PRIORITY FOCUS AREAS WHEN INVESTING IN AI IN THE MEDIA SPACE



# WHILE GLOBALLY CMOs FEEL THERE IS STILL MUCH TO LEARN WHEN IT COMES TO THE USE OF AI IN MEDIA, THERE ARE NUANCES BETWEEN REGIONS IN TERMS OF ITS NEAR-TERM PRIORITIZATION

CMOs in North America and Japan over-index on investments in data analysis and reporting.

## CMO PRIORITY AREAS WHEN INVESTING IN AI IN THE MEDIA SPACE

### NORTH AMERICA

Data analysis and reporting  
(106i)

### LATAM

Media investment and buying  
(126i)  
Strategy, creative, and content  
dev. for media use (113i)

### EMEA

*No significant over-indexation*

### APAC

Strategy, creative, and content  
dev. for media use (113i)  
Developing AI agents (106i)

### JAPAN

Data analysis and reporting  
(116i)



# SECTORS CONNECTED TO LIFESTYLE, SUCH AS LUXURY AND ENTERTAINMENT, ARE MORE LIKELY TO LEAN ON AI FOR CREATIVE AND CONTENT DEVELOPMENT

Food & Beverage CMOs over-index on wanting to better understand risks and opportunities related to generative AI, and on wanting to get better insights into their audiences to improve targeting.

## CMO PRIORITY AREAS WHEN INVESTING IN AI IN THE MEDIA SPACE

### A U T O M O T I V E

Competitive monitoring & analysis (124i)  
Media investment & buying (113i)

### E N E R G Y

Strategy, creative & content dev for media (123i)  
Media investment & planning (126i)

### F I N A N C E & I N S U R A N C E

Understanding use cases, risks, and opportunities (109i)

### F O O D & B E V E R A G E

Understanding use cases, risks, and opportunities (115i)  
Audience insights & targeting (111i)

### L U X U R Y

Strategy, creative & content dev for media (110i)  
Media investment & buying (109i)

### M A N U F A C T U R I N G

Strategy, creative & content dev for media (116i)  
Media planning & optimization (107i)

### M E D I A & E N T E R T A I N M E N T

Strategy, creative & content dev for media (130i)  
Audience insights & targeting (130i)

### P R O F E S S I O N A L S E R V I C E S

Data analysis & reporting (116i)  
Competitive monitoring & analysis (108i)

### R E T A I L

Media operations improvement (111i)  
Media planning & optimization (106i)

### T E L E C O M

Data analysis & reporting (129i)



# CMOs ARE EXCITED ABOUT THE NEW TECH AND CULTURE OPPORTUNITIES EMERGING IN MEDIA AS IT EVOLVES INTO A KEY GROWTH DRIVER

While AI is the long-term North Star, changes in search and integrations into entertainment are the media opportunities CMOs are most excited about in the near term.

## MEDIA OPPORTUNITIES CMOs ARE MOST EXCITED ABOUT FOR THE NEXT 12 MONTHS



# WHILE CMOs ACROSS THE BOARD ARE EXCITED ABOUT SEARCH AND ENTERTAINMENT PARTNERSHIPS, THERE ARE NUANCES ACROSS REGIONS WHEN IT COMES TO OTHER MEDIA OPPORTUNITIES

CMOs in North America over-index on wanting to focus on communities and creators. CMOs in Japan are more focused on the benefits of attention.

## MEDIA OPPORTUNITIES CMOs ARE MOST EXCITED ABOUT FOR THE NEXT 12 MONTHS

### NORTH AMERICA

Increased focus on communities & creators (110i)  
Rise of shoppable media (113i)

### LATAM

Changes in search landscape (111i)

### EMEA

New data & analytics capabilities (106i)  
Changes in search landscape (105i)

### APAC

Live opportunities within streaming (111i)

### JAPAN

More sophisticated understanding of how attention influences long-term sales (116i)



# CMOs IN LUXURY AND RETAIL, IN PARTICULAR, ARE EXCITED ABOUT A GREATER FOCUS ON COMMUNITIES AND CREATORS IN MEDIA

CMOs working for automotive brands are the most excited about entertainment IP partnerships.

## MEDIA OPPORTUNITIES CMOs ARE MOST EXCITED ABOUT FOR THE NEXT 12 MONTHS

### A U T O M O T I V E

Greater integration into Entertainment IP (128i)

### E N E R G Y

Automated messaging (135i)

### F I N A N C E & I N S U R A N C E

Changes in search (113i)

### F O O D & B E V E R A G E

New data & analytics capabilities (106i)

### L U X U R Y

Greater focus on communities & creators (139i)

### M A N U F A C T U R I N G

Consumers adopting AI for discovery (113i)

### M E D I A & E N T E R T A I N M E N T

New data & analytics capabilities (110i)

### P R O F E S S I O N A L S E R V I C E S

New data & analytics capabilities (122i)

### R E T A I L

Greater focus on communities & creators (116i)

### T E L E C O M

Live opportunities within streaming (133i)



# EXPLORING NEW MEDIA PARTNERSHIPS IS A TOP INNOVATION PRIORITY FOR CMOs

CMOs are also looking to adopt data-driven strategies to unearth low-hanging fruit.

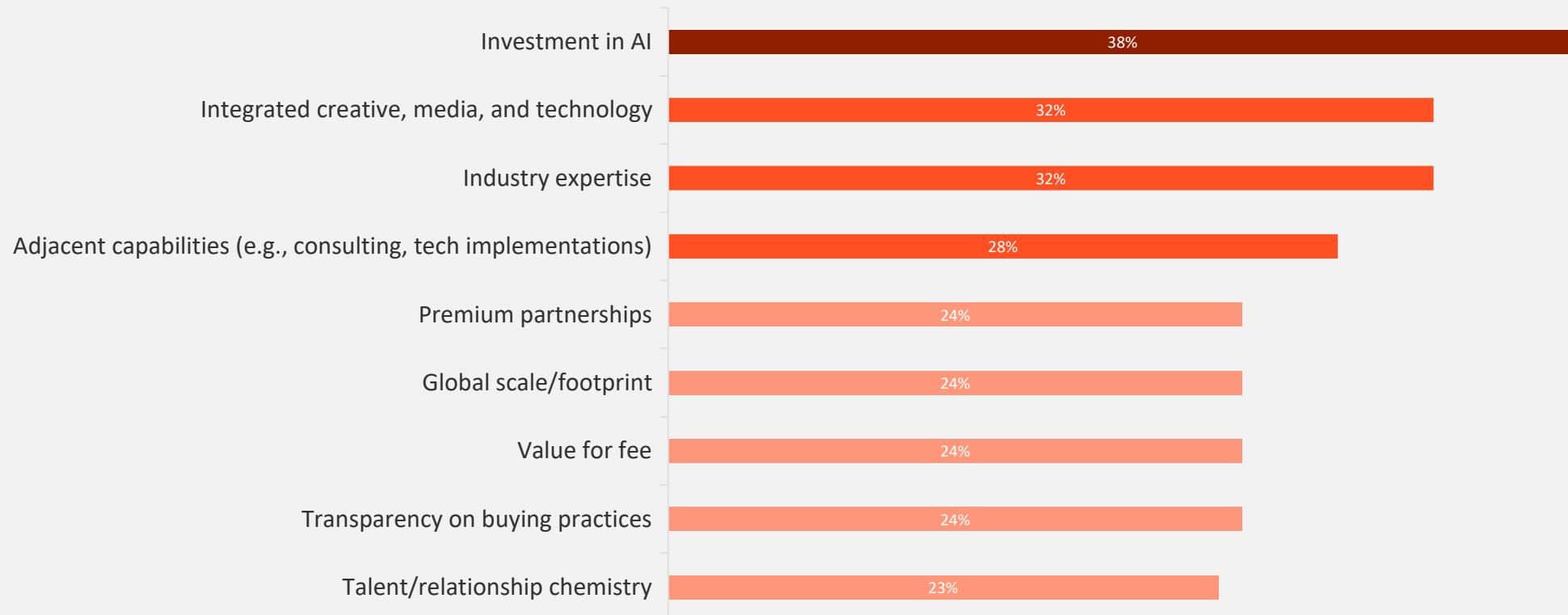
## CMO TOP MEDIA INNOVATION PRIORITIES



# AI EXPERTISE IS EMERGING AS A CRITICAL QUALITY CMOs LOOK FOR WHEN SELECTING A MARKETING PARTNER

Industry expertise, breadth of capabilities, and integration are the usual suspects at the top of the list, but they are being dwarfed by investment in AI.

## QUALITIES CMOs PRIORITIZE WHEN SELECTING A STRATEGIC PARTNER



## CMOs ARE TURNING TO MEDIA TO BRIDGE THEIR BRANDS' WORLDS AND THEIR CONSUMERS' WORLDS

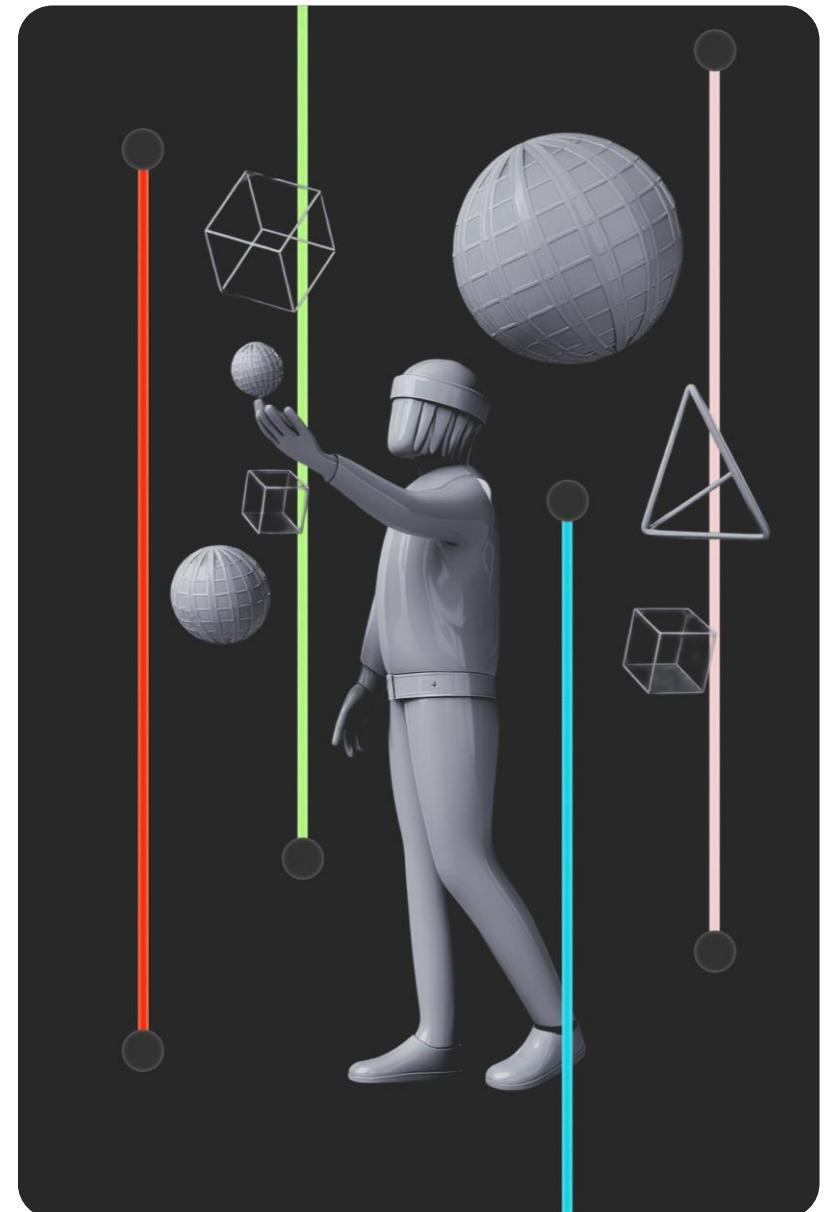
CMOs understand that in the Algorithmic Era, brands must shape feeds to stay relevant to audiences, and that media is essential to achieve this. The media opportunities they are most excited about for the next 12 months (changes in the search landscape, greater brand integration in entertainment IP, and the rise of automated business messaging) all aim to embed brands deeper into culture and consumers' daily lives. To turn these opportunities into tangible growth, CMOs plan to increase investment in search and agentic AI, influencer marketing, and short-form content.

## ARTIFICIAL INTELLIGENCE IS TOP OF MIND FOR CMOs, BUT THEY NEED GUIDANCE TO FOCUS ON THE RIGHT OPPORTUNITIES

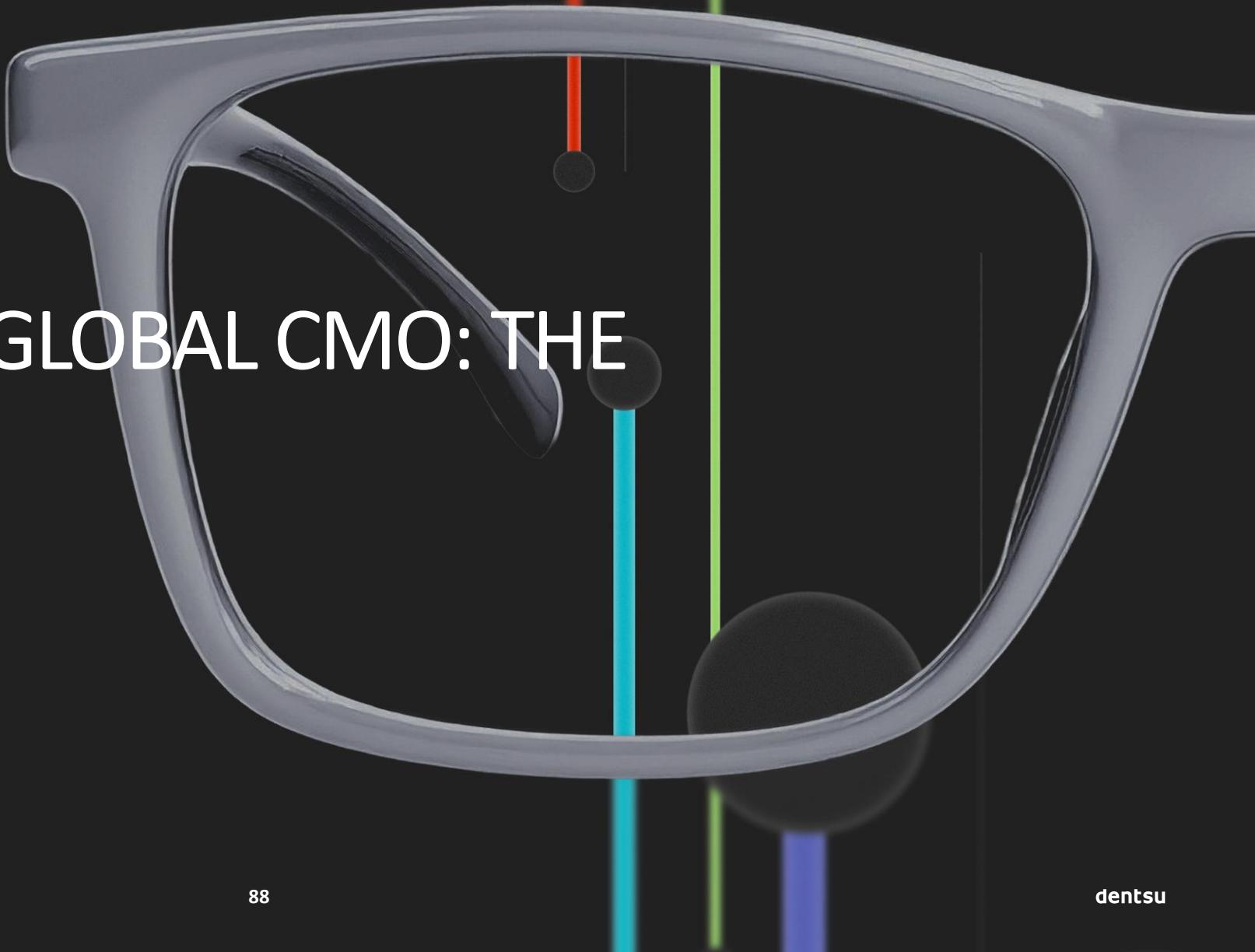
While CMOs recognize vast potential of artificial intelligence in media, they remain divided on where to prioritize investment. This year, again, a significant share of CMOs is still in an exploratory phase, seeking to understand the use cases, opportunities and risks of generative AI. As CMOs look to act decisively, AI expertise is now the most important criterion when selecting a strategic partner.

## DESPITE STRONG CONSENSUS ON THE IMPORTANCE OF ATTENTION, ITS IMPACT ACROSS NEXTGEN VIDEO HAS BEEN UNCLEAR - UNTIL NOW

While most CMOs view attention as a critical or very important metric, many still struggle to understand whether the new video marketplace performs as effectively as linear television, or even how to measure its opportunities. In 2026, marketers will finally get the answers they have been seeking as dentsu unveils *Brand Reset*, the world's largest attention study on video long-term brand and sales impact.



# A NEW BREED OF GLOBAL CMO: THE PERCEPTIVE CMO



# A NEW BREED OF GLOBAL CMO: THE PERCEPTIVE CMO

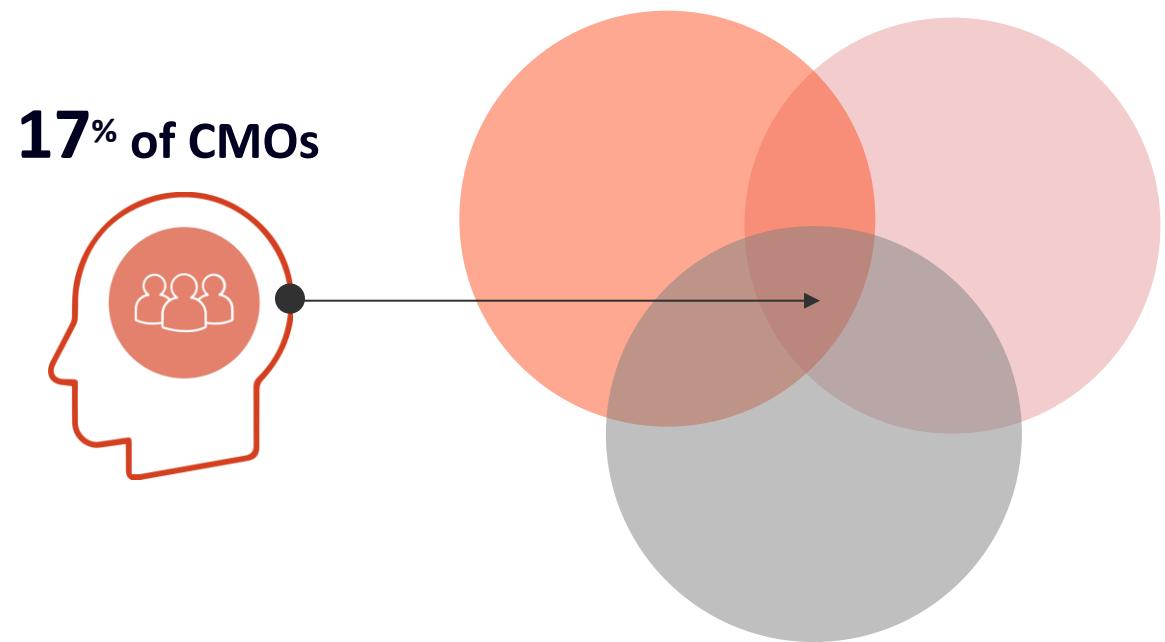
In the previous editions of our *CMO Navigator* series, we compared the responses to identical questions we received from consumers and CMOs to identify a select group of Perceptive CMOs: marketers who are more successful than their peers by calibrating their strategies at the intersection where consumer wants and business needs overlap.

As we continue our study via this report to interview a broader sample of marketing leaders, we repeat this exercise to see how sharing consumer views on culture might put Perceptive CMOs in a better position compared to their peers.

Drawing on findings from our *Consumer Vision 2035: The Insight-to-Foresight Pivot* study and from our *Entertainment Spotlight* series of global reports, we identified consumer preferences around the connection between brands and entertainment IP to test our CMO respondents with.

## Perceptive CMOs:

- Agree with consumers that audiences are increasingly enjoying engaging with entertainment that features cultures other than their own
- Are increasing their investment in entertainment IP partnerships, specifically in anime IP
- Are pursuing a variety of strategies to meet consumers via gaming



## PERCEPTIVE CMOs ARE MORE LIKELY TO DRIVE REVENUE GROWTH FOR THEIR ORGANIZATIONS AND, THUS, MORE LIKELY TO BE TRUSTED WITH BIGGER BUDGETS

Perceptive CMOs are twice more likely than their peers to work for companies that experience greater than 10% revenue increases in the last 12 months. Similarly, the likelihood they are in a position where they feel they can expect +10% budget increases is far more significant compared to non-Perceptive CMOs.

### REVENUE INCREASE IN THE LAST 12 MONTHS

#### Perceptive CMOs

41%

BY UP TO 5%

40%

BY 5 TO 10%

13%

BY MORE THAN 10%

**94%**

**REV. INCREASE TOTAL**

#### Non-Perceptive

42%

39%

7%

**88%**

### EXPECTED BUDGET INCREASE IN THE NEXT 12 MONTHS

#### Perceptive CMOs

21%

BY UP TO 5%

41%

BY 5 TO 10%

32%

BY MORE THAN 10%

**94%**

**REV. INCREASE TOTAL**

#### Non-Perceptive

28%

38%

18%

**84%**



## PERCEPTIVE CMOs ARE FAR MORE RECEPTIVE TO THE CHANGES AI IS BRINGING INTO THE MARKETPLACE COMPARED TO THEIR PEERS

Possibly as a result of this, they are significantly more likely to believe a large share of future revenue will be fueled by disruptions and innovation that are still on the horizon, vs. already in market.

THE PROLIFERATION OF AI CAPABILITIES IS  
COMPLETELY RESHAPING OUR GO-TO-MARKET  
STRATEGIES

Perceptive CMOs

**79%**

Non- Perceptive

**28%**

5 YEARS FROM NOW, 70% OR MORE OF OUR REVENUE WILL  
COME FROM PRODUCTS, SERVICES, AND BUSINESS THAT  
DON'T YET EXIST IN OUR PORTFOLIO

Perceptive CMOs

**34%**

Non- Perceptive

**28%**



# PERCEPTIVE CMOs ARE MORE OPTIMISTIC WHEN IT COMES TO THE DIRECTION OF THE ECONOMY COMPARED TO THEIR PEERS

Organizations headquartered in EMEA markets such as the UK, Italy, and Spain are more likely to see Perceptive CMOs at the helm.

**Region:** EMEA (123i)

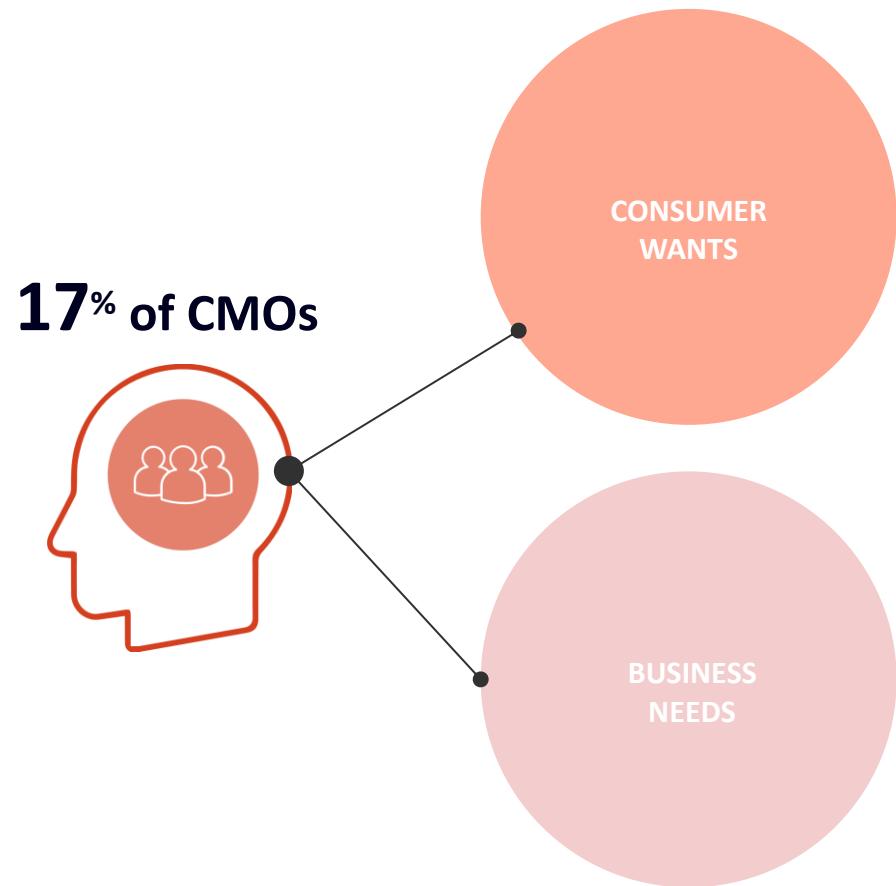
**Country:** UK (140i); Italy (140i); Spain (140i)

**Business model:** *No significant over-indexation*

**Org. Age:** Start ups (123i)

**Industry sector:** Retail (140i); Luxury (133i); Energy (116i)

**Economic outlook:** “The economy will get better” (117i)



# PERCEPTIVE CMOs ARE MORE FOCUSED ON PRODUCT DEVELOPMENT AND TRANSFORMATION INITIATIVES THAN THEIR PEERS

They are proactively investing in the portfolio of offerings that will drive a significant share of future revenue with greater investment in innovation and greater focus in a series of transformation initiatives. They are also more likely to increase their media spend.

## Future role of Marketing:

Developing new products/services (109i)

## Transformation initiatives:

Changing our commercial model (114i)

Expanding assortments of prod./serv. (112i)

Building our own marketplace to resell third-party offerings (105i)

Monetizing our experiences and touchpoints (106i)

## Strategies:

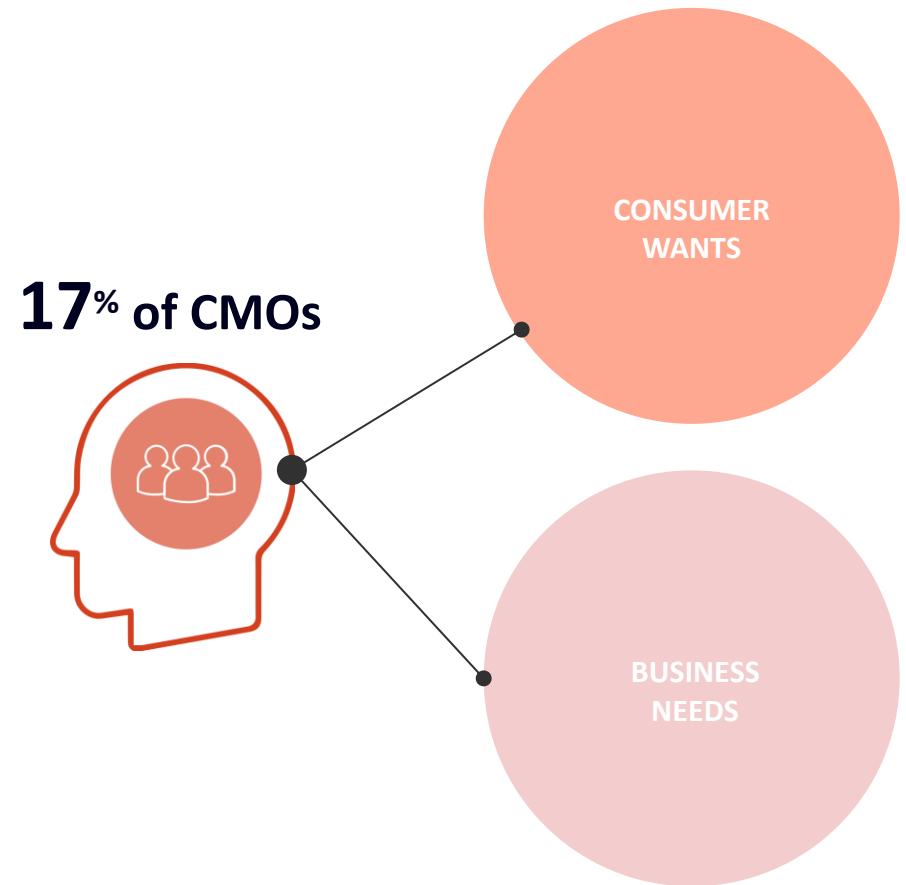
Invest in AI to develop net new offerings (108i)

Adopting AI capabilities to increase mktg. effectiveness (107i)

Shifting spend to loyalty (128i)

Increasing budget for innovation initiatives (121i)

Increasing media spend (112i)



# PERCEPTIVE CMOs' POSITION AT THE INTERSECTION BETWEEN CONSUMER WANTS AND BUSINESS NEEDS IS REFLECTED IN THEIR MINDSET WHEN IT COMES TO MEDIA

Perceptive CMOs are more likely to recognize the criticality of media as a strategic delivery vehicle that connect brands with audiences, and to consider attention a critical metric in measuring the effectiveness of these connections. They are more heavily leaning into AI to enhance the creativity, precision and efficiency of what is being delivered to audiences. The views on culture they share with consumers fuel their excitement for deeper IP partnerships.

## PERCEPTIVE CMO VIEWS ON MEDIA TRANSFORMATION

### IMPORTANCE OF MEDIA AS A DRIVER FOR BUSINESS GROWTH

Media is CRITICALLY IMPORTANT for growth (158i)

### IMPORTANCE OF USING ATTENTION AS A METRIC TO MEASURE MEDIA ACTIVITY

Attention is a CRITICALLY IMPORTANT metric (172i)

### PRIORITY FOCUS AREAS FOR AI IN THE MEDIA SPACE

Strategy, creative, and content development for media use (120i)  
Media planning and optimization (107i)  
Media operations improvement (107i)

### MOST EXCITING OPPORTUNITIES IN MEDIA IN THE NEXT 12 MONTHS

Greater brand integration into entertainment IP (117i)  
Increased focus on communities (109i)  
More sophisticated understanding of how attention influences long-term sales (119i)



## PERCEPTIVE CMOs ARE MORE ALIGNED WITH CONSUMERS WHEN IT COMES TO HOW BRANDS SHOULD CONNECT WITH ENTERTAINMENT

They share the views consumers have when it comes to the popularity of cross-cultural entertainment, and they reflect these views in more significant investments in partnerships with anime IP and integrations into gaming.

## PERCEPTIVE CMOs DRIVE BETTER BUSINESS RESULTS BY LIVING AT THE INTERSECTION OF CONSUMER WANTS AND BUSINESS NEEDS

They are more likely to work for organizations that have experienced more significant revenue increases in the last 12 months, and, likewise, they are more likely to expect budget increases over the next 12 months to fuel their growth agenda.

## PERCEPTIVE CMOs INVEST MORE IN INNOVATION, TRANSFORMATION INITIATIVES, AND NET NEW PORTFOLIOS OF OFFERINGS THAN THEIR PEERS

They have a greater understanding of the impact AI is going to have and that disruptions to come will fuel much of their future revenue. As a result, they are making more significant investments in evolving how their organizations work and how they go to market.

## PERCEPTIVE CMOs ARE MORE LIKELY TO SEE MEDIA THAT CONNECTS WITH CULTURE AS A WAY TO GARNER CONSUMER ATTENTION AND DRIVE GROWTH

They are more likely to assign a critical role to media as a key growth driver and to attention as a metric to measure media activity. They plan to continue making greater investments in entertainment IP compared to their peers and are using AI capabilities strategically to better connect with the audiences this IP will resonate with.



# KEY TAKEAWAYS

## BUSINESS GROWTH INSPIRES AN OPTIMISTIC OUTLOOK

Despite consumers' pessimistic views on the economy, CMO outlook is largely optimistic as a result of positive business performance.

Tariff and trade volatility have not (yet?) impacted brands' business results, but it is informing slight caution.

As a vast majority of businesses report positive business performance, differentiation is sought in increasing investments in brand.

## LEANING ON AI TO DELIVER ON A WIDENING MARKETING MANDATE

Redesigning marketing in the age of AI is the new mission of CMOs.

The set of responsibilities marketing is entrusted with keeps growing as business mature.

CMOs forecast a radically transformed business landscape and pursue transformation initiatives to better prepare their organizations to thrive in it.

## HOW AI IS RESHAPING CMO STRATEGIES

In a very dynamic environment, CMOs are facing different challenges depending on the context in which their brand operates.

Regardless of their specific approach, AI is having a profound impact on all CMO strategies, and its adoption is the common denominator within them.

The desire to lean into uncharted territories is likely leading CMOs to seek support outside their organization.

## PARTNERING WITH SPORTS & ENTERTAINMENT IP

CMOs are increasing their investment in a variety of entertainment partnership opportunities to strengthen their connection with consumers.

In addition to IP partnerships, CMOs are making sure their brands are present in the spaces and communities where entertainment is adapted and discussed.

CMOs are divided on whether entertainment IP as a means for brands to engender loyalty will be affected by increasing reliance on AI or not.

## MEDIA TRANSFORMATION IN THE ALGORITHMIC ERA

CMOs are turning to media to bridge their brands' worlds and their consumers' worlds.

Artificial intelligence is top of mind for CMOs, but they need guidance to focus on the right opportunities.

Despite strong consensus on the importance of attention, its impact across NextGen video has been unclear - until now.

## A NEW BREED OF GLOBAL CMOs: THE PERCEPTIVE CMO

Perceptive CMOs are more aligned with consumers when it comes to how brands should connect with entertainment.

Perceptive CMOs drive better business results by living at the intersection of consumer wants and business needs.

Perceptive CMOs invest more in innovation, business transformation and net new portfolios of offerings than their peers.

Perceptive CMOs are more likely to see media that connects with culture as a way to garner consumer attention and drive growth.



## ABOUT DENTSU

Dentsu is an integrated growth and transformation partner to the world's leading organizations. Founded in 1901 in Tokyo, Japan, and now present in over 145 countries and regions, it has a proven track record of nurturing and developing innovations, combining the talents of its global network of leadership brands to develop impactful and integrated growth solutions for clients. Dentsu delivers end-to-end experience transformation (EX) by integrating its services across Media, CXM and Creative, while its business transformation (BX) mindset pushes the boundaries of transformation and sustainable growth for brands, people and society.

Dentsu, innovating to impact.

<https://www.dentsu.com/>

<https://www.group.dentsu.com/en/>