EUROPEAN MARKETING CONFEDERATION

EUROPEAN MARKETING AGENDA 2026

BEYOND THE HORIZON: AI ADOPTION, CUSTOMER EXPERIENCE, AND OMNICHANNEL EXCELLENCE AS DRIVERS OF COMPETITIVE ADVANTAGE

Dr. Ralf Strauss | Chairman of the Board European Marketing Confederation (EMC)

EMC EUROPEAN MARKETING CONFEDERATION

A EUROPEAN MARKETING AGENDA 2026 …

THE SEARCH OF EXCELLENCE BETWEEN STEADY TRANSFORMATION AND RESILIENCE

In the coming years, we will continue to experience “Moore’s Law on steroids” in the marketing and sales function: speed (agile) leadership dominates strategy in the AI age and heralds the end of previously (largely) stable competitive advantages. The success story of providers such as *OpenAI* will soon be surpassed by *DeepSeek* or *ManusAI*. The increase of new concepts at the speed of light (such as AI agents) are bringing about a paradigm shift of a special kind:

- **Processes and applications are becoming more granular, more finely chiselled** … the result is an orchestra of multiple process steps, domains and AI agents that (are supposed to) cover an application scenario.

- **The call for cross-functional end-to-end processes must leave** the hangar of theoretical treatises and face reality.

- **Functional organisational structures will gradually dissolve into freely configurable team and competence clusters** … cross-functional, flexible team structures are “without an alternative”.

- **Organisational learning requires the expansion of know-how, especially in the field of AI.** Failure to adopt new novel concepts and their underlying thought patterns may constantly encounter stifle organisational structures leading to a potential failure by design.

- **There is no “silver bullet”** … rather, a permanent “test & learn” process, ideally in constant exchange with other companies (benchmarking). Instead of glossy presentations, there is a need for more depth of content and genuine application of “lessons learned”.

Our ambition as marketing associations in Europe, Asia, and Africa in 2026, will be to complement and lead this change and present and discuss current and forward-looking concepts. We are very pleased that the survey has also been rolled out to colleagues in Africa (*African Marketing Confederation*, AMC), as well as Asia (*Asian Marketing Federation*, AMF), uniting ca. 300,000 marketing & sales professionals (heads of marketing, heads of digital/ marketing, CMO, head of sales) across these 3 regions. A heartfelt thank you goes to all 1,876 participants of the *Marketing Agenda 2026* survey for their input, suggestions, ideas, engagement, and the underlying "brain power", and for their time between November 11 and December 10, 2025. We hope that the present *European Marketing Agenda 2026* report once again offers many suggestions and discussion points, and that we can deepen these together in 2026 in various formats and events across Europe, Asia, and Africa.

We look forward to many substantive discussions and exchanges in 2026!
Hamburg/Germany, January 2026

Warm regards,

Dr. Ralf E. Strauss, on behalf of the board of EMC
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Chris Pozzoli, President SwissMarketing (Switzerland)
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B MARKET STRATEGY:
DATA-DRIVEN CUSTOMER INTIMACY AND PRODUCT & SERVICE DIFFERENTIATION LEADING

In a world defined by constant AI-based acceleration, traditional strategic models of incremental differentiation are giving way to a new paradigm: ***speed leadership***. Competitive advantage is no longer secured by long planning cycles or carefully sequenced roadmaps, but by an organization's ability to sense change instantly, mobilize resources fluidly, and translate emerging opportunities into tangible value at unprecedented pace. Speed leadership reframes strategy as a living, dynamic force … one that thrives on rapid experimentation, perpetual reinvention, and the courage to move before certainty arrives. As markets evolve in real time, the leaders of tomorrow will be those who can transform velocity itself into their most powerful differentiator.[1]

Customer intimacy (43 %) appear to be the most critical strategy because it aligns an organization's success directly with its ability to understand, anticipate, and respond to the evolving needs of its customers. In markets where products and technologies can be replicated quickly, deep insight into customer motivations, behaviors, and pain points becomes the only sustainable source of differentiation. As a result, **product & service differentiation** come in second place (41 %). Customer intimacy enables companies to create tailored experiences, build long-term trust, and foster emotional loyalty that competitors cannot easily disrupt. By placing the customer at the center of all strategic and operational decisions – starting with products and services, organizations not only increase lifetime value but also gain a continuous stream of insight that fuels innovation, strengthens resilience, and ensures relevance in an ever-changing competitive landscape.[2]

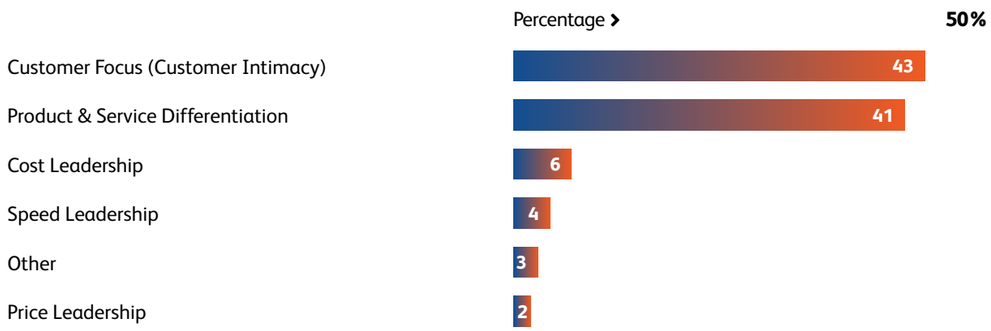

Figure 1 | Strategy in Marketing & Sales (in percent, n=977)

1 Rayport, J. F.; Jaworski, B. J.: Best Face Forward. Why Companies Must Improve Their Service Interfaces with Customers, Boston 2005.
2 Treacy, M.; Wiersema, F.: The Discipline of Market Leaders: Choose Your Customers, Narrow Your Focus, Dominate Your Market, New York 1977.

C STRATEGIC FOCUS IN 2026: ORCHESTRATING AI-DRIVEN INTELLIGENCE AND CUSTOMER-CENTRIC GROWTH, BUILDING MENTAL AVAILABILITY FOR THE BRAND

In the companies of tomorrow, marketing transcends its traditional role and becomes the orchestrator of value creation, guiding organizations to anticipate and shape the future rather than merely respond to it (Figure 2). It acts as the lens through which customer needs and customer centricity (68 %), technological possibilities, and market dynamics converge, transforming insights into strategies that inspire loyalty, spark innovation, and redefine industry standards, stronger in Asia and Africa in comparison to Europe. Marketing is no longer a supporting function – it is the engine that connects purpose with experience, strategy with execution, and ambition with impact, ensuring that the organization moves with agility, foresight, and a relentless focus on creating meaningful, lasting relationships with its customers.

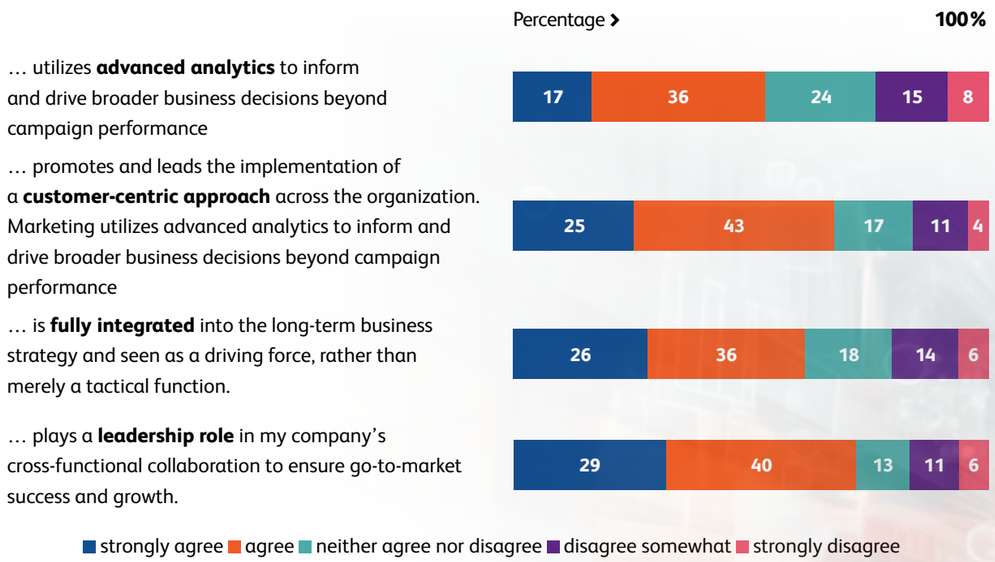

Figure 2 | Role of Marketing in Strategic Business Leadership (in percent, n=965)

As 2026 approaches, marketing and sales are entering a decisive phase in which strategy is defined by speed, intelligence, and customer relevance rather than scale alone. Strategic focus is shifting toward the intelligent use of **AI** to anticipate demand, orchestrate personalized experiences, and enable real-time decision-making across the customer journey. At the same time, organizations are prioritizing customer intimacy, omnichannel coherence, and the integration of retail and media ecosystems to create measurable business impact. When asked about the strategic focus for 2026+, the range of topics stayed stable compared to previous years: key topics such as brand management (upper funnel; 38 %) and sales and performance marketing (lower funnel; 43 %) got further traction … catching up with the use and application of AI in pole position (43 %; Figure 3).

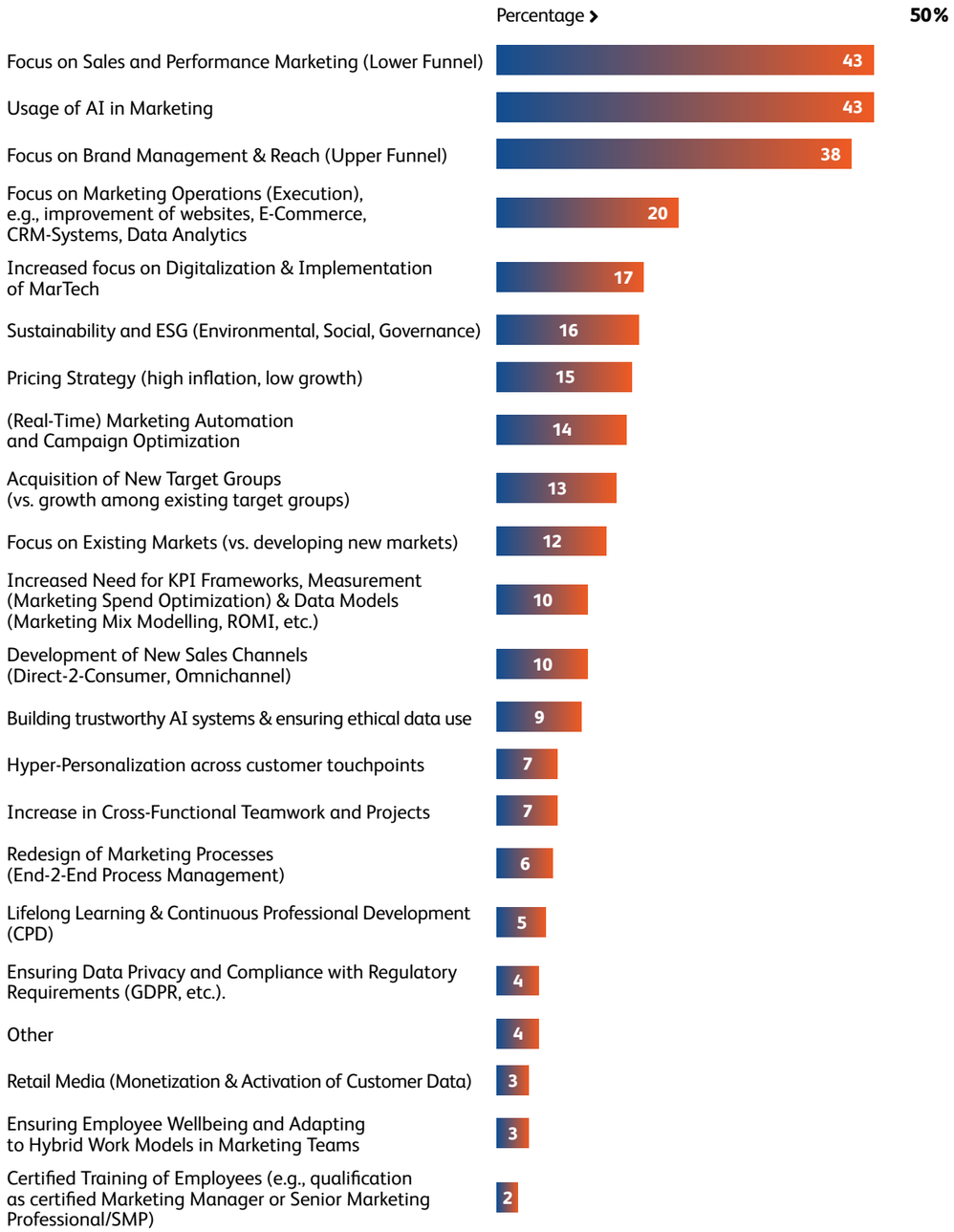

Figure 3 | Strategic Focus in 2026 (Top 3, Mult Response, in percent, n=1,236)

Equally critical is the transformation of internal capabilities and marketing operations (20 %) breaking down silos, modernizing data and technology foundations, and empowering teams to execute with agility. Together, these focus topics signal a move from optimization to orchestration, positioning marketing and sales as the central drivers of growth, resilience, and competitive advantage in 2026 and beyond. In 2026, success in digital transformation for marketing and sales will no longer be measured by ambition or technological investment, but by the ability to turn vision into execution in measurable figures and brand values. As digital capabilities mature, the **“competitive divide”** will be defined by organizations that can operationalize data, AI, and omnichannel strategies at speed and scale. “Getting things done” means moving beyond pilots and proofs of concept toward embedded, outcome-driven solutions that are fully integrated into daily workflows. This requires clear strategic ownership, cross-functional collaboration, and a culture that rewards experimentation, decisiveness, and continuous learning. In an environment of constant change, digital transformation becomes less about managing complexity and more about building organizational momentum … where executional excellence itself becomes the most powerful differentiator.

In 2026, **“mental availability”** emerges as a central strategic imperative for brand marketing, reaffirming *Byron Sharp’s* insight that brands grow by being easy to think of and easy to buy.[3] As media ecosystems fragment and attention becomes increasingly scarce, the challenge is no longer reach alone, but sustained presence across moments, contexts, and channels that matter to consumers. Mental availability in this environment is built through distinctive brand assets, consistent yet adaptive communication, and broad, continuous exposure amplified by data and AI. Rather than chasing short-term conversion at the expense of scale, leading marketers in 2026 will invest in memory structures that endure, ensuring their brands remain salient in buying situations … today, tomorrow, and at the speed of the market.

While the focus in previous years was on topics such as brand management or digital marketing (in total), the use and application of AI over-shadows everything else in 2026 again (Figure 4).

3 Sharp, B.: How Brands Grow: What Marketers Don’t Know, Oxford 2010.

Strategic Priority	2023	2024	2025	2026
No. 1	Digital Marketing (in total, 41 %)	Brand Management & Reach (Upper Funnel, 49 %)	Usage of AI in marketing (44 %)	Usage of AI in marketing (43 %)
No. 2	Customer Experience Mgmt (34 %)	Marketing Operations (Execution, 49 %)	Brand Management & Reach (Upper Funnel (34 %)	Sales & Performance Marketing (Lower Funnel, 43 %)
No. 3	Brand Strategy & Mgmt (26 %)	Increased Focus on Digitalisation & Implementation of MarTech (45 %)	Sales & Performance Marketing (Lower Funnel, 33 %)	Brand Management & Reach (Upper Funnel (38 %)

Figure 4 | Comparison of Strategic Focus between 2023 and 2026 (Top 3, Mult Response, in percent, Different Sample Sizes)

As traditional search (SEO/SEA) gradually migrates from traditional search engines to AI-driven large language models (LLMs, **AIO/GEO**), the role of the brand is poised for a profound transformation. In a landscape where consumers rely on conversational, context-aware AI to guide decisions, brand presence is no longer just about visibility … it becomes about trust, clarity, and distinctiveness in the digital mind space of both humans and algorithms. Brands that succeed in this era will not only optimize for keywords but will encode their identity, values, and differentiators into AI-accessible content and narratives, ensuring they are consistently recognized, recommended, and prioritized in LLM-driven interactions. By shaping perception at the intersection of human intent and machine mediation, brands in 2026 will evolve from being passive entities in search results to active architects of choice in a world where AI mediates the path to purchase (**"Zero Click"**). As a result across all countries, branding goes together with the usage of AI. While Austria, The Netherlands, Switzerland, and UK focus on "Sales & Performance Management", Portugal focusses its attention on the "Usage of AI" first (Figure 5).

Strategic Priority	Austria	Hungary	Netherlands
1	Focus on Sales and Performance Marketing (Lower Funnel, 52 %)	Focus on Sales and Performance Marketing (Lower Funnel, 48 %)	Focus on Brand Management & Reach (Upper Funnel, 46 %)
2	Usage of AI in marketing (38 %)	Usage of AI in marketing (44 %)	Usage of AI in marketing (45 %)
3	Focus on Brand Management & Reach (Upper Funnel, 38 %)	Focus on Brand Management & Reach (Upper Funnel, 38 %)	Focus on Sales and Performance Marketing (Lower Funnel, 39 %)

Strategic Priority	Portugal	Switzerland	UK
1	Usage of AI in marketing (52 %)	Focus on Sales and Performance Marketing (Lower Funnel, 43 %)	Focus on Sales and Performance Marketing (Lower Funnel, 41 %)
2	Focus on Sales and Performance Marketing (Lower Funnel, 37 %)	Usage of AI in marketing (38 %)	Usage of AI in marketing (37 %)
3	Focus on Brand Management & Reach (Upper Funnel, 30 %)	Focus on Brand Management & Reach (Upper Funnel, 37 %)	Focus on Brand Management & Reach (Upper Funnel, 33 %)

Figure 5 | Comparison of the strategic focus between the countries in Europe in 2026 (Mult Response, in percent, n = 1,155, statistically significant)

Success will no longer come from focusing on one at the expense of the other; strong, distinctive brands must coexist with hyper-personalized, insight-driven customer engagement powered by AI and advanced analytics. Marketing and sales **organizations** will need to balance creativity and consistency with speed, experimentation, and measurable impact … ensuring that brand identity is preserved and strengthened, even as decisions are increasingly guided by real-time data. Those that can integrate emotional resonance with analytical precision will turn marketing into a true engine of growth, resilience, and differentiation, navigating the tension between brand heritage and technological innovation to lead in a rapidly evolving marketplace. It is never branding OR AI and data-driven customer interaction but an AND … jointly together … putting even further pressure on the organization in terms of processes, speed and efficiency in execution, as well as skills and competencies required.

With sales and performance management being on the winner's podium, also **SalesTech** is growing with 15-17 % per year. The challenge as of today: instead of being an (inter)active platform for customer interaction, it is predominantly used as a pure "system of records" for internal process management & controlling. Data storage/administration takes precedence over genuine customer interaction. Consequently, highest satisfaction ratings in SalesTech are given to lower value-add scenarios such as Reporting & Forecasting (e.g. sales forecasts, predictive analytics), lead & pipeline management (e.g. scoring, tracking), as well as mobile access (sales apps, offline mode e.g. for checking the "Perfect Store" in FMCG). Higher valued scenarios such as persona-based communications or **Behavior-Science-Led Selling** are not in usage at all so far. Therefore, the next wave in data-driven customer interaction in sales in the front-office will be driven by :

- Leveraging back-office data and analytics in the front-office (e.g. Next Best Offer, e-detailing).
- In combination with psychological concepts as of *Robert Cialdini* ("Principles of Persuasion") such as Reciprocity, Commitment & Consistency, Social Proof, Liking, Authority, Scarcity, or Unity.[4]

Data-driven analytics and customer interaction tools will be merged cross-functionally with psychology.

4 Cialdini, R. B.: Influence: Science and Practice (6th ed.), Boston 2021.

Across all senior marketing executives, at least 4 distinct **clusters** emerge:

- **Cluster 1: Balanced Growth Marketers (53 %):** While AI is already being explored and applied by many organizations in the Balanced Growth cluster, it is not framed as a primary strategic driver. Instead, AI is treated as an enabling technology embedded within broader brand, performance, and operational priorities:
  - » no extreme peaks in priorities, focus on existing markets, balanced mix of brand, performance, operations and digital, representing the "mainstream" of marketing organizations.
  - » Key priorities: rand management & reach, sales and performance marketing, AI and digital capabilities (as enablers, not dominant drivers), marketing operations.

- **Cluster 2: Sustainability Marketers (11 %):** Sustainability and ESG considerations form the central strategic anchor, shaping both marketing priorities and organizational behavior:
  - » Sustainability & ESG are the defining anchor, long-term, value-driven perspective
  - » Key priorities: sustainability and ESG, organizational and cross-functional collaboration, usage of AI in Marketing, brand management & reach

- **Cluster 3: Operational Performance Marketers (14 %):** Organizations in this cluster are primarily focused on execution, efficiency, and scalability. Marketing operations constitute the core of their strategy, supported by a strong emphasis on sales and performance marketing:
  - » Marketing operations are the dominant focus, strong emphasis on sales and performance outcomes, process-, efficiency- driven mindset
  - » Key priorities: marketing operations, performance marketing, KPI frameworks, measurement and data models, usage of AI in Marketing

- **Cluster 4: AI & Automation Pioneers (22 %):** This cluster consists of technology-forward organizations that position AI at the center of their marketing strategy. Artificial intelligence, automation, and real-time optimization are key levers for driving scale, speed, and personalization. Advanced digitalization and marketing technologies are embraced to gain competitive advantage and amplify brand impact:
  - » Usage of AI is highly distinctive, strong focus on automation, personalization and a tech-forward mindset, emphasis on innovation
  - » Key priorities: AI in marketing, automation and real-time optimization, data and advanced technologies, brand and reach at scale

D OPERATIONAL FOCUS IN 2026:
EMBEDDING AGILITY, INTELLIGENCE, AND EXECUTIONAL EXCELLENCE

Consequently, the operational focus of marketing will centre on agility, integration, and executional excellence. Organizations will need to break down silos across functions and channels, enabling seamless collaboration between marketing, sales, data, and technology teams. Automation, AI-driven workflows, and real-time analytics will become the backbone of daily operations, allowing marketers to scale personalized experiences while maintaining consistency and brand integrity. **Operational excellence** will also require the ability to rapidly test, learn, and iterate … turning insights into action faster than ever before. In this environment, the most successful marketing organizations will not only define strategy but will embed it into every process, system, and touchpoint, ensuring that execution itself becomes a driver of growth, customer relevance, and sustainable competitive advantage.

In terms of **operational focus areas for 2026**, digital marketing (28 %) continues to dominate, followed by AI (23 %) and customer experience management (19 %, Figure 6). While the strategy is dominated by AI, operational implementation is already much more focused on scenarios around digital marketing or customer experience management in the form of further personalization or next best offer management.

Due to the demise of classical search engine optimization, content management is at the heart of digital marketing, essentially attempting to address target groups in a targeted manner with relevant information and encourage them to interact (inbound). Currently the shift to GenAI search (**Artificial Intelligence Optimization, AIO/GEO**) are game-changing:

- Shift from link-based discovery to answer-based consumption, reducing the need for users to compare multiple sources.
- Increased reliance on AI-mediated responses, with less transparency into sources and selection logic.
- Compression of the customer journey, as awareness, consideration, and decision phases increasingly converge.
- Decline in traditional SEO value, replaced by the need for semantic relevance and AI-readable content.
- Greater importance of brand authority, trust, and mental availability to be referenced or recommended by AI.
- Reduced direct website traffic, impacting performance marketing and attribution models.
- Concentration of influence in fewer touchpoints, amplifying winner-takes-most dynamics.
- Higher risk of invisibility for lesser-known or weakly differentiated brands.
- Growing importance of data quality, consistency, and structured knowledge across owned and external sources.
- Increased strategic role of marketing in shaping narratives that influence both human and AI perception.

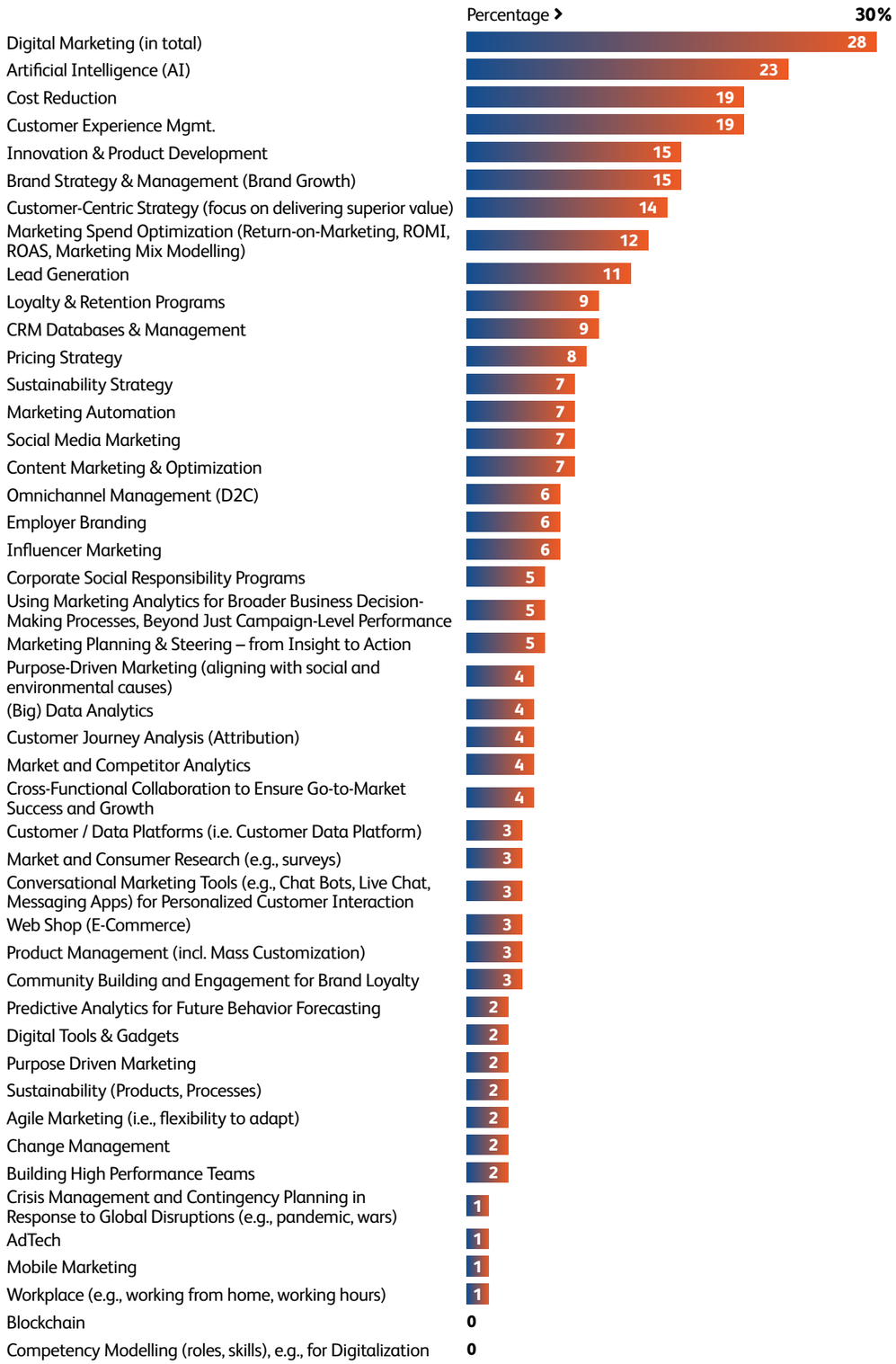

Figure 6 | Operational focus in 2026 (top 3, Mult Response, in percent, n=1,111)

AEO (Answer Engine Optimisation), LLMO (Large Language Model Optimisation), or GAIO/GEO (Generative AI Optimisation) will overtake traditional search by 2027 at the latest. AI-based search systems (**“Zero Click”**) evaluate content more strongly based on depth of content, understanding of context and user intent:

- Depth of content & context.
- User intention & question focus.
- Verifiable expertise & trust.
- Multimodal & context-rich content.
- Prompt- & snippet-appropriate text structure.

A direct influence and optimization with regard to search on training data for large language models it is hardly possible, as they use huge and regularly updated amounts of data. It is therefore more important to optimize current, publicly accessible **content**. In this vein, AI-based SEO thus requires a combination of content excellence, semantic depth, contextual understanding, trust-building transparency and modern technical standards, across all touchpoints, in real time (Figure 7).

Freshness

AI pulls in new information when

Query mentions dates, e.g. “2025”	Topic changes fast (SEO updates, market shifts)	User ask for „latest“, “current”, or “today”
Content to publish		
News-Style updates	Industry commentary	Timely stats and event coverage

Local Intent

AI searches for live sources when

The question is location-specific	The query uses “near me” or a place name	The answer requires regional context
Content to publish		
Local landing pages	Regional focused guides	Directory-style content with schema

In-Depth Context

AI searches for live sources when

Fresh structured, detailed explanations	Content that breaks down expert know-ledge into teachable, repeatable formats	
Content to publish		
Long-form guides	Technical documenta-tion	Step-by-step framework with visuals

Personalisation

AI turns to the web when answers must be tailored

Examples based on roles, industries, or use cases	Prioritizes content that reflex real-world constraints & audience-specific language	
Content to publish		
Role-specific guides	Industry playbooks	Personalized case studies

Content Frequency / Reliability

Daily: news, trends, quick takes	Weekly: tactical reports and studies
Content to publish	
Monthly: evergreen guides and resource pages	Quarterly: surveys, data studies, and industry research

Content Structure / Access

Refresh pages every 3-6 months	Link related pages into topical clusters	Add schema markup (FAQ, HowTo, QA Page)
Content to publish		
Use headings and lists for scannability	Lead with direct answers (40-50 words)	Reference structure

Figure 7 | Building blocks of content management for AI-based Search Optimization (AIO)[5]

AI-supported analyses are used to identify patterns and make predictions about user preferences. Dynamic content adjustments along the customer journey leads to greater relevance, a stronger emotional connection between brand and customer, and, as a result, higher loyalty and conversion rates. In the case of hyper-personalization, the AI-enhanced customer experience goes one step further towards the **“real-time experience”** postulated by *Regis McKenna*: companies can engage with customers en masse, personally, in real time and in a relevant context.[6] The objective: to generate up to 40 % more revenue compared to competitors.

Aspect	Personalisation	Hyper-Personalisation
Definition	The practice of crafting experiences or content to suit the needs of a specific group of users.	The practice of using real-time data and advanced AI to deliver individualised content or experiences to users.
Data Utilisation	Often uses basic date like demographics and previous purchase history.	Makes use of comprehensive, real-time data to understand individual behaviours, habits, preferences and immediate context.
Experience	Provides a generally tailored experience for customers, often based on broad segmentation.	Provides an experience that feels as if it was designed for the individual user, considering even the smallest detail.
Precision	Provides a broad level of personalisation. It caters to a group with similar traits or behaviours.	Ensures a much higher level of precision, tailoring experiences to the unique preferences and behaviours of an individual.
Real-Time Adaptability	Limited adaptability. Changes in customer behaviour may not be immediately reflected.	Highly adaptable in real-time. Changes in user behaviour. preferences or context are immediately acted upon.
Predictive Capabilities	Basic prediction capabilities based on historical data and trends.	Advanced predictive capabilities thanks to the analysis of complex patterns in user behaviour and preferences.

Figure 8 | Difference between personalisation and hyper-personalisation[7]

The challenges of content management in data-driven customer interaction management as a basis for hyper-personalization are complex:

- Scalability of content operations: growing demand for efficient content creation and distribution based on data-driven personalization.
- Automation and AI-supported content creation.
- Multi-channel delivery with different formats and channel-specific styles (cross-media) preparation.

5 Marketing Tech Monitor 2026, forthcoming.

6 McKenna, R.: Real Time: Preparing for the Age of the Never Satisfied Customer, Boston 1997.

7 Lee, M.: Hyper-personalisation Strategies: Unlocking the Potential of Customised Experiences, New York 2023.

E CRISIS? … WHAT CRISIS?

STABLE MARKETING BUDGETS IN 2026

Despite all the doom and gloom, inflation concerns and political risks, the majority the marketing budget remains stable or increases for around 75 % of companies, in particular in Africa (Figure 9). The gloom that is often celebrated in public and the fatalism in the media regarding future developments are difficult to understand, at least from the perspective of data-driven customer interaction. AI continues to act as a "turbo booster" here as well.

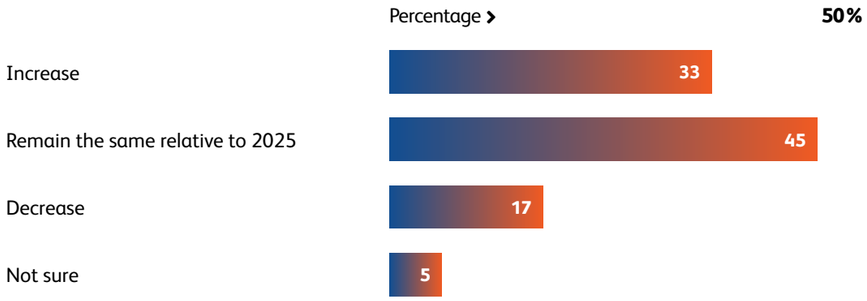

Figure 9 | Expectation for Marketing Budget in 2026 (in percent, n=967)

Thus, expenditures on AI and data driven customer interaction appear to be (largely) immune to political and economic fluctuations in the market environment. The reasons for this are:

- The move towards data-driven customer interaction and the use of AI is part of the overall corporate strategy or competitive strategy for digitalisation. The pace of AI-driven change continues to increase, and investments follow the credo of "no alternative", which is often used in politics.
- Most companies have been preparing for years and have decided to continue investing in digitalisation and AI as a high priority … despite all the adversity.
- The need to combine (externally oriented) customer experience management with (internally focused) performance optimisation (efficiency) based on data.
- Longer (preliminary) lead times for projects aimed at achieving data-driven customer interaction make them (largely) immune to short-term fluctuations.

F HURDLES AND CHALLENGES IN 2026:
NAVIGATING COMPLEXITY, SPEED, AND THE FIGHT FOR RELEVANCE

If we once again aggregate the most important challenges for marketing & sales in 2026 across Europe, Asia, and Africa, the challenge "*Lack of understanding and knowledge of how AI will change the way we do business*" catapults to first place (30 %), together with (a real evergreen) "*Consolidation of distributed customer data to determine a 360-degree customer view*" (24 %), head-to-head with generating a consistent customer experience along all touchpoints (24 %, Figure 10). The platitudinous discussions about the use of AI and the call for customer centricity fade away in the face of insufficiently systematic collection and utilization of customer data.

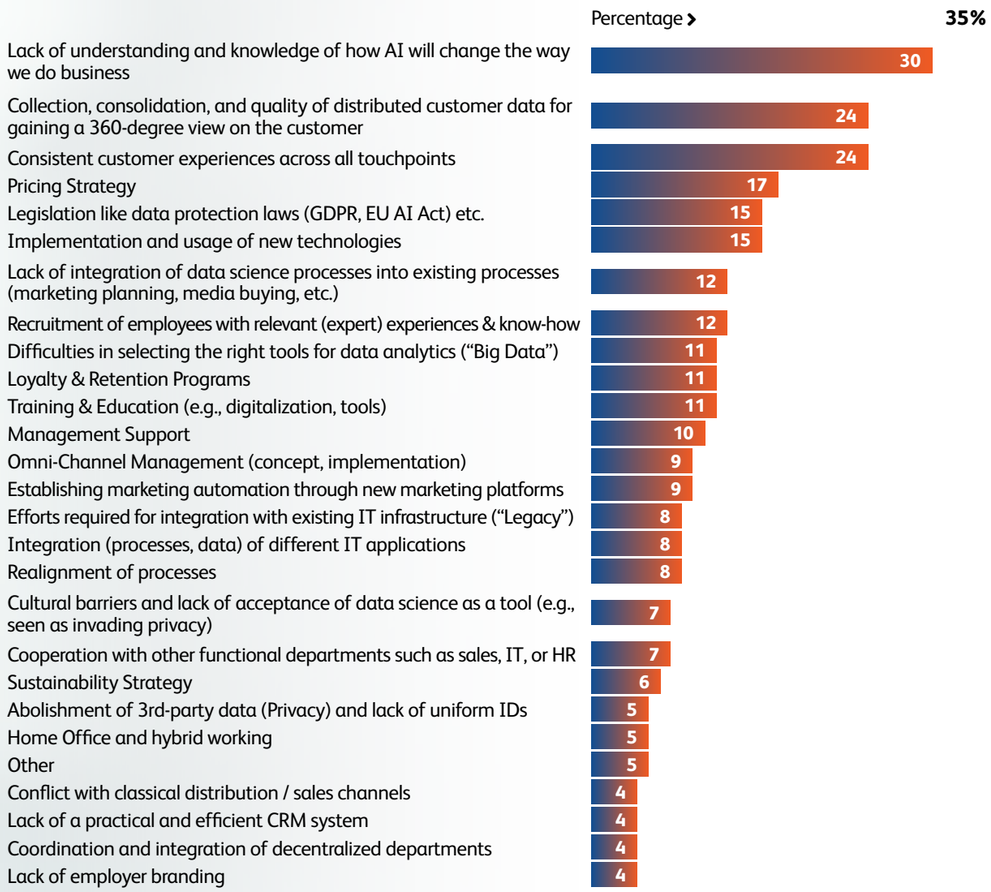

Figure 10 | Most important challenges & barriers in the coming 12 months in marketing in Europe, Asia, and Africa in 2026 (top 3, Mult Response, in percent, n=1,018)

Marketing challenges in Asia, Africa, and Europe reflect three distinct realities shaped by economic maturity, technological infrastructure, and consumer behaviour:

- In **Asia**, the primary challenge lies in managing scale and speed … operating within hyper-digital ecosystems where innovation cycles are relentless and customer expectations evolve in real time.
- **Africa** faces the challenge of growth under constraint, balancing rapid mobile-led adoption with fragmented markets, limited data availability, and uneven infrastructure.
- **Europe**, by contrast, must navigate complexity, where strict regulation, legacy systems, and organizational inertia often slow transformation despite advanced capabilities.

Together, these regions illustrate that the challenge in marketing is not the absence of opportunity … but the ability to adapt strategies to fundamentally different conditions while maintaining relevance, efficiency, and trust, e.g. dealing with legislation as well as training & education (Figure 11).

	Asia	Africa	Europe
Legislation like data protection laws (GDPR, EU AI Act) etc.	20 %	8 %	15 %
Training & Education (e.g., digitalization, tools)	18 %	20 %	10 %
Sustainability Strategy	15 %	17 %	6 %

Figure 11 | Comparison of biggest challenges in marketing & sales in 2026 between Asia, Africa, and Europe (in percent, n=1.018, statistically significant)

G AI AS THE NEW MARKETING INTELLIGENCE BACKBONE:

2026 MARKS THE SHIFT FROM AUTOMATION TO ANTICIPATION

With ChatGPT as an application in the field of large language models and supervised/reinforcement learning, the use of AI in marketing and sales is no longer embryonic … and is triggering a real boom. Adoption rates of 40 % within a period of just 2-3 years go hand in hand with the explosion of increasingly efficient foundation models.[8] The better is the enemy of the good: The market launch of ***DeepSeek*** and ***Manus AI*** has shown that reinforcement learning can be implemented efficiently and cost-effectively. The previously dominant mantra of creating more and more comprehensive applications with ever-increasing computing power is being countered by more efficient algorithms. Intelligence beats brute force (budget/computing power). At the same time, the AI train continues to speed towards:[9]

- **Edge AI LLMs in every pocket:** AI is shifting from the cloud to local devices (i.e. smartphones, laptops, wearables, IoT devices). Large language models (LLMs) are being compressed so that they can run on smaller devices (edge devices, such as phones), even without a permanent internet connection. The trade-off is in precision, speed and efficiency.
- **Autonomous AI agents take over:** In the future, AI agents will not only assist but also map entire process chains.
- **AI courses in every discipline:** The aim is – in addition to the obligation to obtain further qualifications in accordance with EU AI Act Article 4 – to prepare everyone for a world in which AI is woven into everything.

8 Hu, J.: I Analysed Four Papers on AI Adoption, So You Don't Have To, in: AI Advances, 25 October 2024; Bick, A.; Blandin, A.; Deming, D. J.: The Rapid Adoption of Generative AI, in: National Bureau of Economic Research, Working Paper 32966, February 2025.
9 Roldan, M.: AI Predictions For 2025!, in: Towards Data Science, 2 December 2024.

In most cases, the “campaign of excitement” is caused by a lack of fundamentals … terminology and application scenarios are unclear. Many AI pilots have been launched (and some companies now have more pilots than some airlines)... but only a very few are already in a productive phase and integrated into operational processes (12 %, Figure 12).

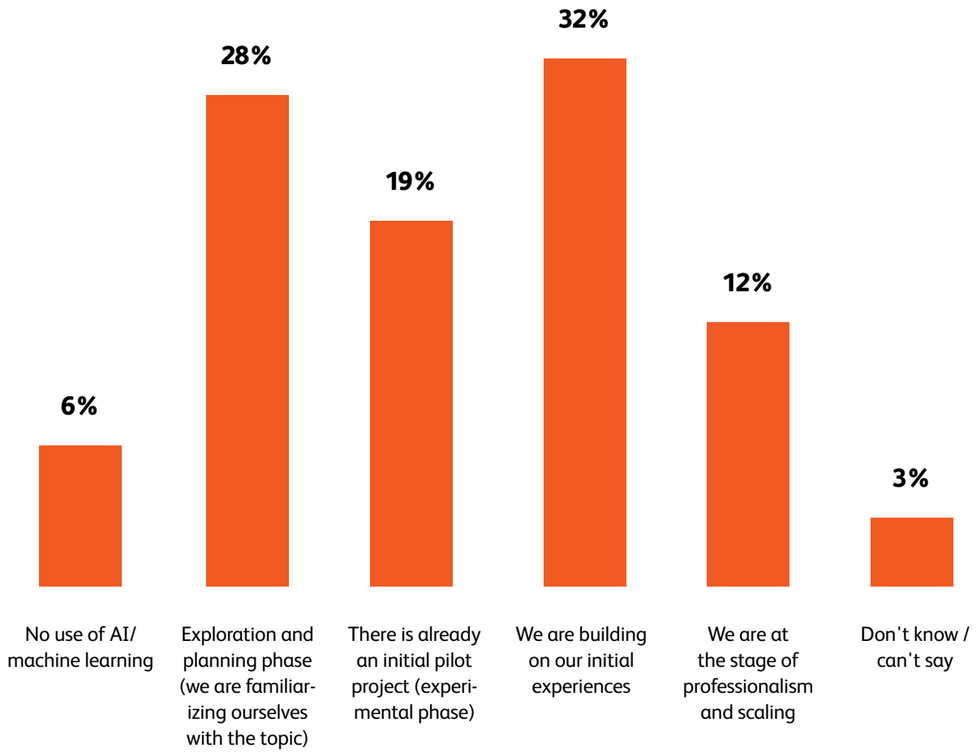

Figure 12 | Degree of intensity / maturity of usage of AI within the own company (in percent, n=859)

The use of AI in marketing and sales varies markedly across Africa, Asia, and Europe, shaped by differences in market maturity, infrastructure, regulation, and business priorities (Figure 13):

- In **Asia**, AI adoption is highly advanced and deeply embedded in digital ecosystems, enabling real-time personalization, predictive commerce, and seamless integration across platforms.
- **Europe** approaches AI with a more structured and governance-driven mindset, focusing on responsible use, data privacy, and incremental value creation within established organizational frameworks … but speeding up.
- **Africa**, while at an earlier stage of adoption, is characterized by rapid experimentation and leapfrogging, leveraging mobile-first technologies and AI-driven efficiency to overcome structural constraints.

Together, these regions illustrate how AI in marketing and sales is not a single global trajectory, but a set of regionally distinct pathways toward competitive advantage, which results in significant differences between the three regions.

	Asia	Africa	Europe
No use of AI/machine learning	14 %	13 %	5 %
Exploration and planning phase (we are familiar)	23 %	39 %	27 %
There is already an initial pilot project (experimenting)	16 %	10 %	20 %
We are building on our initial experiences	29 %	20 %	33 %

Figure 13 | Comparison of the degree of intensity / maturity of usage of AI within the own company between Asia, Africa, and Europe (in percent, n=859, statistically significant)

The objectives behind the use of AI in marketing and sales are evolving from efficiency-driven automation toward strategic value creation. Organizations increasingly deploy AI to deepen customer understanding, enable more precise targeting and personalization, and optimize decision-making across the entire customer journey (Figure 14). Beyond improving operational productivity, AI is used to accelerate speed to market, enhance forecasting accuracy, and support sales teams with real-time insights and recommendations. Ultimately, the primary objective of AI adoption is not technology enablement itself, but the creation of scalable, data-driven growth by aligning customer relevance, commercial performance, and organizational agility.

Figure 14 | Objectives of using AI (in percent, n=859)

The use of AI in marketing and sales spans a growing set of interconnected sub-areas that extend far beyond automation. At a strategic level, AI supports market analysis, demand forecasting, and decision-making by transforming large volumes of data into actionable insights. In content production, AI enables faster and more scalable creation of messages, visuals, and assets while maintaining relevance across channels and audiences (Figure 15). At the customer interface, AI powers hyper-personalization by dynamically adapting offers, pricing, and communication in real time based on individual behaviour and context. Together, these sub-areas illustrate how AI is reshaping marketing and sales from end to end, embedding intelligence into strategy (60 %), execution with creation (46 %) and content production (40 %), and automation (31 %).

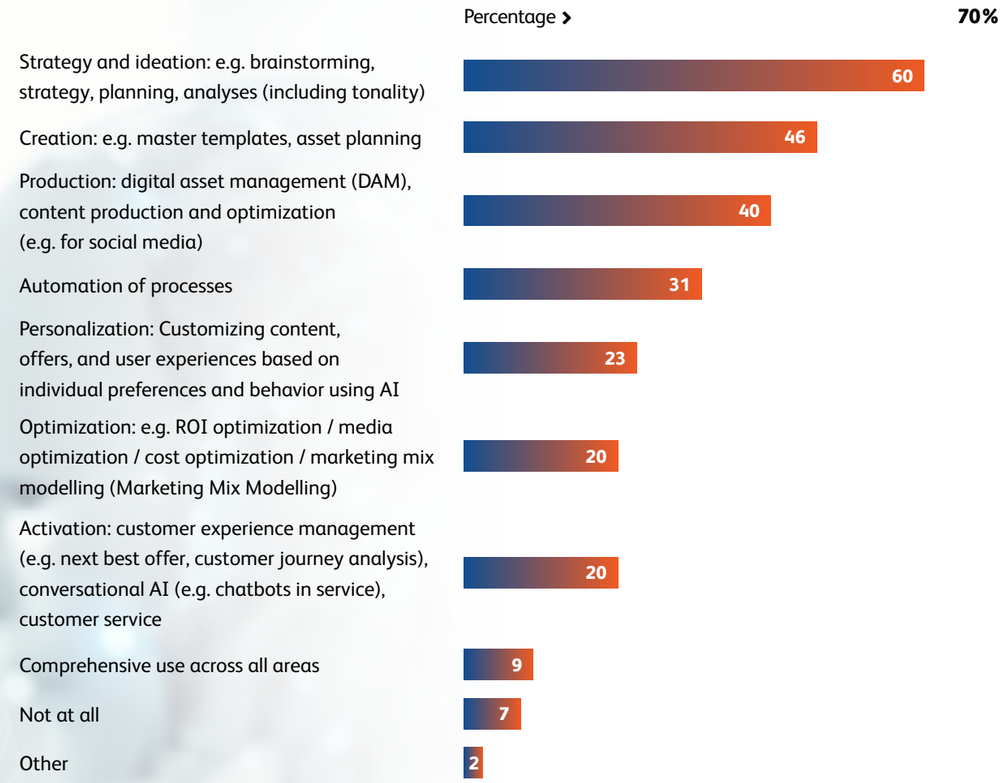

Figure 15 | Sub-area along the marketing value chain AI is already used and for what specific purposes (in percent, n=859, mult response)

Beneath aspirational headlines and explosive technical advances, AI projects have a poor track record as of today. The most important challenges on the company side are:

- A lack of detailed application expertise (45 %). Insufficient knowledge about business benefits and AI application scenarios as well as limited insight of those involved regarding the intended overall system, associated with missing or insufficient knowledge in the business area regarding detailed process flows and the resulting requirements for an AI scenario.

- Knowledge of technical capabilities of the systems (32 %) … dealing with a sea of currently more than 4,000 dedicated AI applications in marketing and a growth rate of 75-80 % p.a. … mostly overlapping in functionality and use cases covered.

- As well as integration with different other systems (29 %; Figure 16).

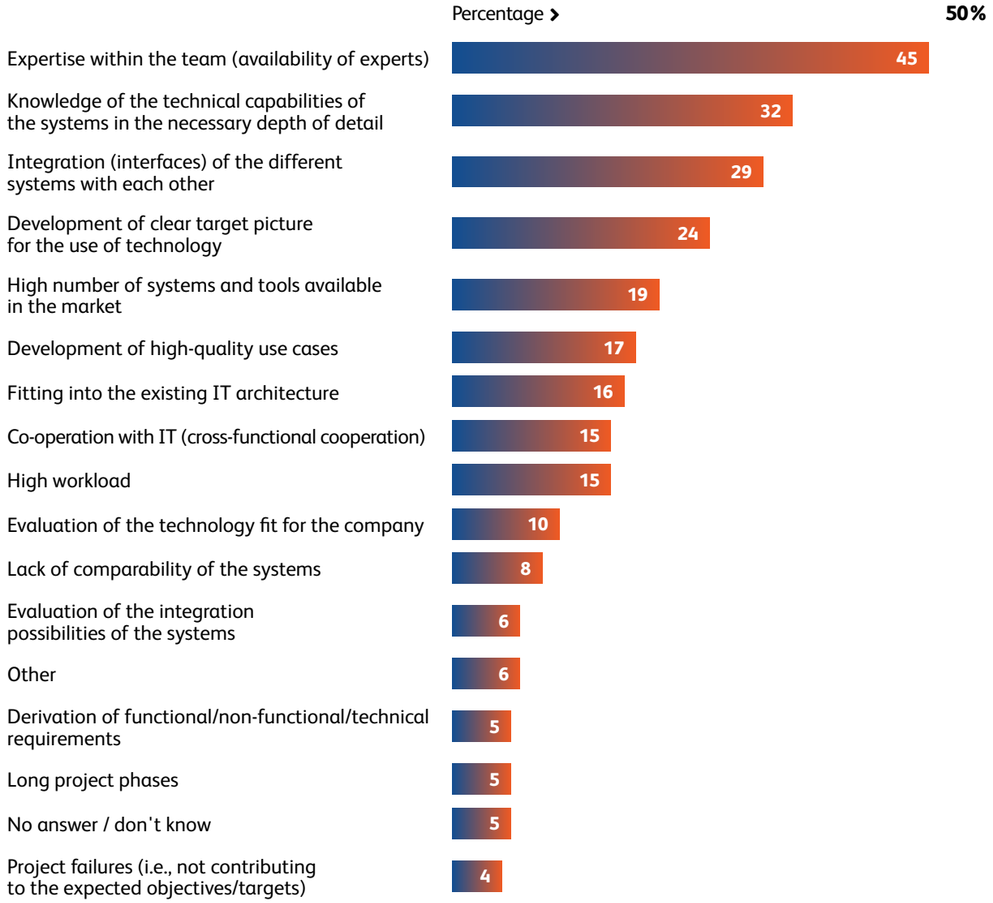

Figure 16 | Biggest difficulties in selecting and applying AI applications (in percent, n=808, mult response)

As before, the multitude of available IT applications means that the functions and possible application scenarios in the field of AI cannot be overlooked. Due to a lack of knowledge of the detailed possibilities and fit into the existing process and application landscape, a hot-blooded, albeit irrelevant, discussion about functions and features of the respective tools arises. From a management perspective, this leads to concerns about:

- **Data protection and data security:** by disclosing sensitive company data, which leads to the creation of an AI manifesto and guidelines, among other things.
- **Security risk (prompt injection):** manipulating AI responses through malicious input.
- **Validation and avoidance of hallucinations:** Ensuring the accuracy of AI-generated content and preventing "hallucinations".
- **Reputational risk:** through misuse or misinterpretation of AI-generated content.
- **Compliance with legal regulations:** Compliance with the evolving legal framework for the use of AI as "unchartered territory".
- **Ethical use:** in line with the company's values and social norms.

While close cooperation between business departments and IT seems natural and necessary, the survey, as well as the interviews reveal a different picture. To paraphrase *Woody Allen*, collaboration between specialist departments and IT is often like a marriage: "*an attempt to solve problems together that you don't have on your own.*" The marriage between marketing and sales as business departments and IT therefore remains a challenge in every case … similar to the two serial marriages of *Jennifer Lopez* and *Ben Affleck*. Couples therapy clearly begins with a bleak assessment of the state of domestic cooperation during the initial session on the therapist's couch. Almost half of companies rate the collaboration as "rather poor" and lament the tribal feuds and petty politics that have been lovingly cultivated over many years.

H THE FUTURE WILL BE AGENTIC

AI AGENTS AS THE NEXT EVOLUTIONARY LEAP

AI agents will shape the next evolutionary development phase of AI, with the ability to act autonomously and solve more complex problems. With the rise of AI agents, we are witnessing a seismic shift in the way we approach work, and it's changing everything. The next wave of AI is waiting already around the corner. In its essence, AI agents are software programs that interact with their environment, process data, and make autonomous decisions. Compared to the most commonly used prompt engineering tools or robotic process automation, AI agents are taking steps towards autonomy (Figure 17):

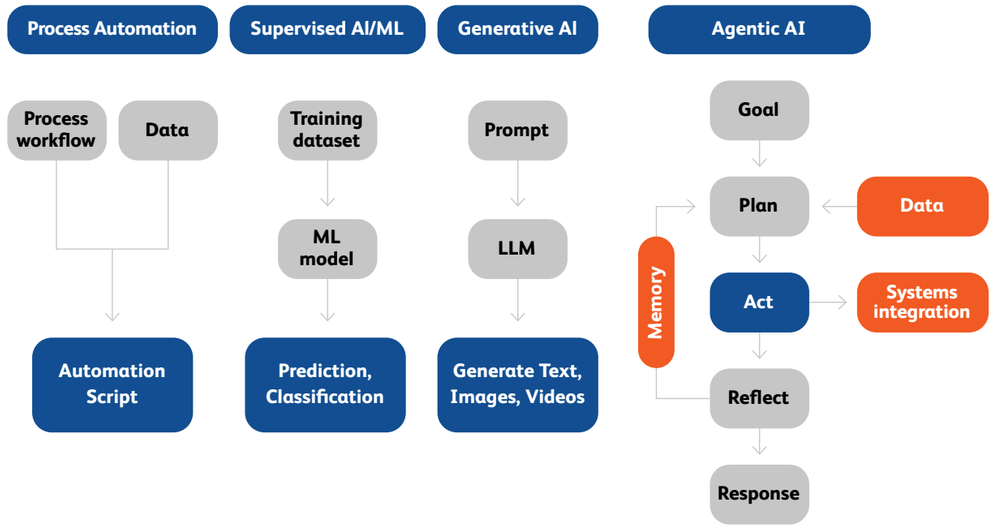

Figure 17 | Evolutionary steps from process automation to GenAI to Agentic AI[10]

10 Biswas, D.: Agentic AI Inference Sizing. Understanding Pricing for AI Agents, in: AI Advances, 3 March 2025.

- **Flexibility, autonomy, logical thinking:** they are capable of drawing complex conclusions and making context-based decisions. They can adapt to unforeseen situations, respond to changing data and adjust in real time (such as Agentic RAG), while prompt engineering is geared towards predefined rules and processes with limited flexibility.

- **Adaptive learning ability:** AI agents can learn from new data and experiences, enabling them to improve independently, unlike traditional robotic process automation (based on preset rules and a static, predefined context, without learning ability).

- **Dynamic task decomposition:** can dynamically break down complex tasks into smaller, manageable subtasks and adapt them based on real-time feedback. Prompt chaining usually follows a linear, fixed sequence of tasks.

- **Goal-oriented behaviour:** work towards overarching goals and can change their approach, if necessary, while automation scripts are designed to perform specific tasks without an overarching goal.

- **Dynamic adaptability to unforeseen scenarios:** can adapt to new and unknown scenarios by using machine learning and contextual understanding, enabling them to make decisions even in cases for which they have not been explicitly trained.

Multi-agent systems combine several AI agents to achieve a common goal – with the challenge of orchestration, for example ... [11]

- **... the management of complex application scenarios:** they distribute tasks and combine the strengths of different agents.

- **... improved adaptability and scalability:** they can adapt better to changing environments or goals than individual agents and open scaling potential.

- **... increased robustness:** they are not dependent on a single point of failure. If one agent fails, others can compensate for this and ensure continued operation.

From a future IT application perspective, vast majority of real-world use cases with these agents are to enhance existing MarTech functionality or to implement net new functionality. While the systems of knowledge will remain pretty stable and decisive for the upcoming years, big enterprise IT applications will be replaced by agents focusing on single application scenarios, use cases, and domain areas (Figure 18).

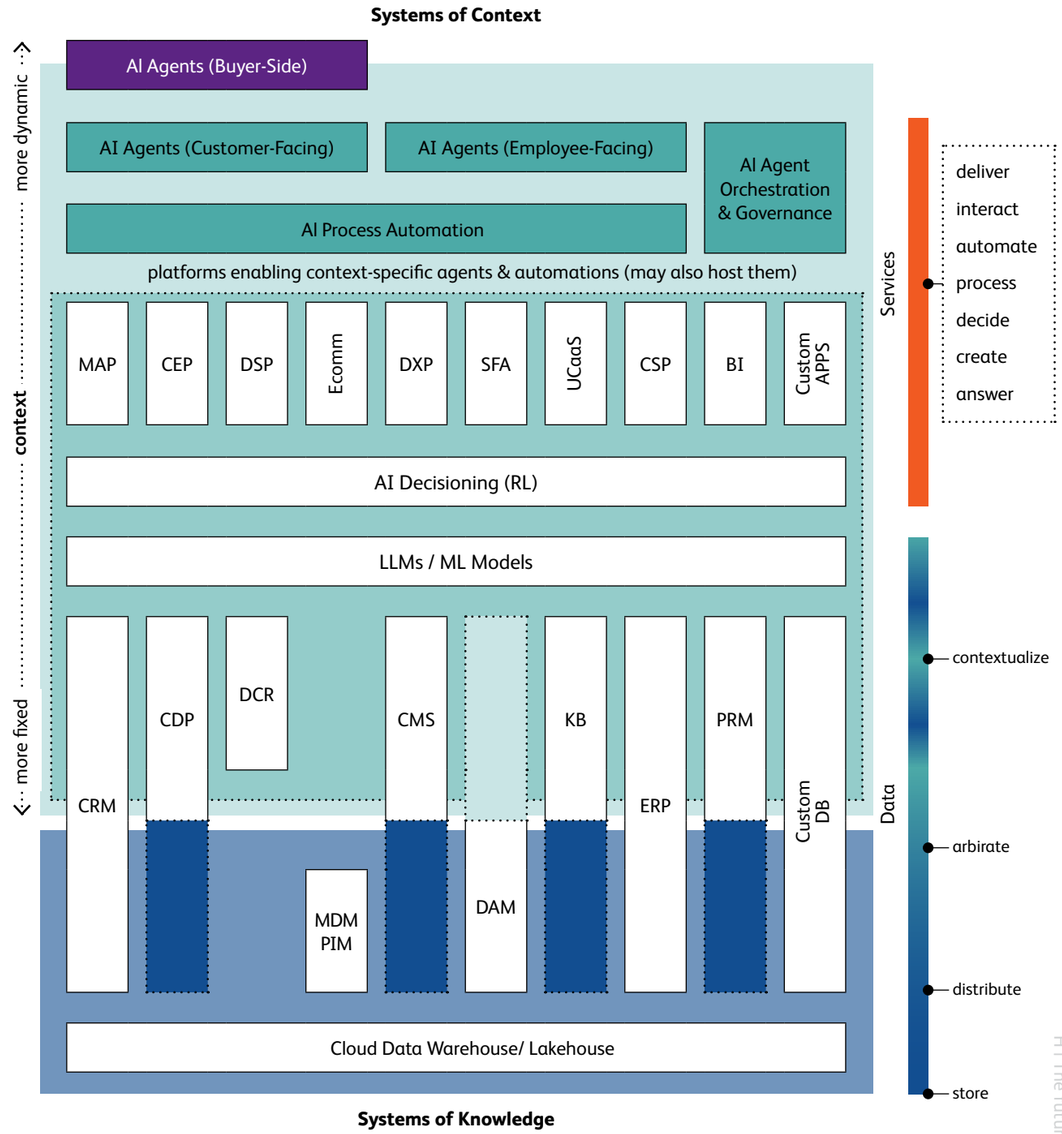

Figure 18 | Future Marketing & Sales Application Landscape according to Brinker[12]

11 Yugank, A.: Multi-agent Orchestration Overview, in: Medium, 27 January 2025.

12 Brinker, S.; Riemersma, F.: State of MarTech 2026, December 2025. With AI-Artificial Intelligence; BI-Business Intelligence; CDP-Customer Data Platform; CEP-Customer Engagement Platform; CMS-Content Management System; CRM-Customer Relationship; Management; CSP-Customer Success Platform; DAM-Digital Asset Management; DB-Database; DCR-Data Clean Room; ERP-Enterprise Resource Planning; KB-Knowledge Base; LLM-Large Language Model (e.g. GPT-4); MAP-Marketing Automation Platform; ML-Machine Learning; MDM-Master Data Management; PIM-Product Information Management; PRM-Partner Relationship Management; RL-Reinforcement Learning; SFA-Sales Force Automation; DSP Demand-Side Platform (advertising); UCaaS-Unified Communications as a Service; DXP-Digital Experience Platform; XTC-New Wave Band; Marketing Tech Monitor 2025/2026.

Currently, application scenarios are primarily expected in the areas of automated content creation (54 %), A/B testing and optimisation, automated email delivery (65 %) and customer service automation (Figure 19). Comparatively higher-value data-based and analytics scenarios such as marketing mix modelling or price management are fading into the background. Automated escalations in service are predominant in Asian markets in comparison to Europe and Africa.

Process efficiency dominates over analytical, data-based optimization.

Area	Task	Application Scenario (Use Case)	In %
Marketing	Lead generation & qualification	Lead generation & qualification	49 %
		Automated capture & qualification of leads	34 %
	Personalisation	Automated Content-Development	54 %
		Recommendation Engines	24 %
	Social Media Management & Monitoring	Automated posts & interactions	36 %
		Social Listening	47 %
	Campaign Optimization	A/B-Tests & Optimization	40 %
		Automated Budget Allocation (Marketing Mix Modelling)	18 %
Sales	Lead-Nurturing & Follow-Ups	Automated email & follow-up campaigns	65 %
		Chatbots for lead engagement	45 %
	Quotation creation & sales documents	Automated quotation creation	25 %
		Pricing & discounts	20 %
	Sales analytics & forecasting	Sales Forecasting	40 %
		Sales performance analysis	51 %
Service	Customer inquiries & support	Automated FAQ responses	61 %
		Ticketing systems	33 %
	Problem solving & troubleshooting	Self-Service portals	38 %
		Automated error diagnosis	24 %
	Customer support optimization	Automated escalation	19 %
		Proactive customer care	34 %
	Customer feedback & analysis	Sentiment analysis	30 %
		Automated feedback management	42 %

Figure 19 | Processes or tasks most suitable for automation by AI agents (in percent, different sample sizes)

I CUSTOMER EXPERIENCE AND CRM

… LEAVE THE LAST DANCE TO ME?

Customer Experience Management (also known as Experience Design) is a concept (since around 1998) that focuses on creating high-quality, consistent interactions with customers across all touchpoints and throughout the entire customer or product lifecycle.[13] The basic idea: the key to customer loyalty lies in providing customers with the best possible experiences (‘moments of truth’) at all times. The customer experience is significantly influenced by perceived quality and the ‘experience flow’ – i.e., the extent to which services and products are perceived as high quality in terms of their attributes and presentation, tailored to the needs of the user (relevant) in the respective context, and presented in a natural sequence. The focus is on the desire for diverse – but consistent – and high-quality dialogue opportunities between customers and companies across all touchpoints. While CRM takes a more instrumental and process-oriented perspective (inside-out), CX management focuses on customer perception as an overarching concept (outside-in).

13 Fluckinger, D.: What is customer experience management (CEM or CXM)?, in: TechTarget, July 2020; Sheehan, J.: Customer Experience Management Field Manual: The Guide For Building Your Top Performing CX Program, Boston 2019; Schögel, M.; Herhausen, D.: The Customer Experience Navigator, St. Gallen 2024.

Even though customer experience management has been presented as a key focus for the work of CMOs/ marketing managers in the coming year, it is rarely possible to bring the concept to life in reality (beyond an atmospheric PowerPoint showcase) – the lion's share is assigned to the 'structuring and optimisation phases' at most (Figure 20):

- **Awareness phase (18%):** Initial discussions about the role of customer experience (CX), focus on product or service quality rather than customer experiences; lack of data and processes to make CX measurable.
- **Foundation phase (15%):** Introduction of tools such as CRM, definition of initial KPIs (e.g. NPS), start of customer feedback collection and evaluation.
- **Structuring phase (24%):** Definition of a clear vision and strategy for customer experience, identification of touchpoints along the customer journey, development of initial standard processes to improve CX.
- **Optimisation phase (19%):** Introduction of modern technologies such as AI and automation to enable real-time interactions. Personalised experiences based on customer data and behaviour patterns. Establishment of omnichannel communication and service.
- **Integration phase (7%)**: Unified CX strategy. Customer feedback is systematically used to improve products, services and processes. CX is integrated into the corporate culture and is a central component of the strategy.
- **Innovation phase (9%):** Proactive identification and fulfilment of customer needs. Use of predictive analytics and customer journey mapping to optimise CX. Introduction of new technologies and approaches to exceed customer expectations.
- **Transformation phase (7%):** Customer experience is at the heart of all business decisions. Maximum agility to respond to changes in the market and customer behaviour. Continuous improvement through innovation and feedback.

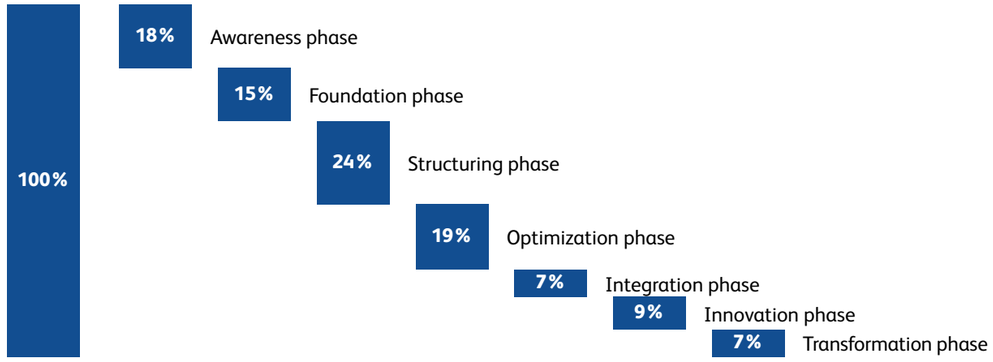

Figure 20 | Status of implementation of customer experience management (in percent, n=943)

In a nutshell, while customer centricity is at the heart of the marketing and sales strategy, practical execution lags significantly. Moreover, in most companies, customer experience is evaluated based on an analysis of complaints and customer satisfaction within Net Promoter Scores (NPS). The NPS is calculated by subtracting the percentage of "detractors" from the percentage of "promoters". The resulting value can range from -100 to +100, with values above +70 considered excellent. Contrary to its popularity, this intuitively easy-to-understand approach presents several challenges, such as:[14]

- **Simplification of customer relationships:** based on a single question, which is not sufficient to capture all relevant influencing factors such as price, product quality or service quality. The classification into "promoters", "passives" and "detractors" is often criticised as arbitrary and overly simplistic. Case studies at Virgin Atlantic, Kia, Ford and ALDI Süd show no correlation between NPS and actual market share.
- **Lack of context:** NPS does not provide any information about the reasons behind the ratings. Without additional qualitative data, it remains unclear why customers are dissatisfied or do not recommend the company to others.
- **Problems with interpretation:** The difference between promoters and detractors does not provide any insight into the distribution of responses. Two companies can have the same NPS value even though their customer satisfaction levels vary greatly. Negative ratings often carry more weight than positive ones, which is not apparent from a simple subtraction.
- **Insufficient consideration of passive ratings (7-8):** These are ignored in the calculation, even though they are potentially at risk of churn and could provide valuable information.
- **Susceptibility to manipulation:** In some cases, the NPS is linked to employee bonuses, which can lead to manipulation or "targeted begging" for higher ratings in direct interaction at the POS.
- **Focus on loyalty rather than acquisition:** The NPS primarily measures customer loyalty but does not provide insights into new customer acquisition or competitive dynamics.

14 Keiningham, T. L.; Cooil, B.; Andreassen, T. W.; Aksoy, L.: A Longitudinal Examination of Net Promoter and Firm Revenue Growth, in: Journal of Marketing (July 2007), Vol. 71; Reichheld, F.; Darnell, D. Burns, M.: Winning on Purpose: The Unbeatable Strategy of Loving Customers, Boston 2021.

The tectonic shifts in consumers' needs and values are contributing to individual expectations and desires becoming increasingly important – culminating in the 'moment of truth' across all touchpoints. As a result, "customer experience minstrels" usually end up on the pyre of practical implementation, such as identifying actual drivers (causalities), linking CX to business results or even inherent 'navel-gazing' due to a purely internal perspective. Most companies are therefore rather indifferent when it comes to their satisfaction with their chosen customer experience approach; only around one third say they are 'somewhat satisfied'. This is hardly euphoria. Lofty and ambitious strategies hardly meet reality.

The reason: a lack of understanding of the customer journey as the path a potential customer takes from initial contact with a company, product or service to the point of purchase. This means that the conceptual basis is lacking in the necessary granularity of content (outside-in). In most cases, "Touchpoint Tinder" lacks a comprehensive description of all the touchpoints that a potential customer goes through on their journey across all interaction channels until they perform a desired action, such as a purchase or a recommendation. This means that the conditions for planning and deploying IT applications as "enablers" of an improved customer journey are rarely met ... Failure by design. Swiping in "Touchpoint Tinder" can therefore only be done to the left (rejection).

J

WHEN OMNICHANNEL VISION MEETS REALITY:

HOW DATA FRAGMENTATION AND RIGID PROCESSES HOLD BACK SEAMLESS CUSTOMER EXPERIENCES

Reasons for implementing an omnichannel approach include broader market coverage and the more cost-effective targeting of a wide variety of customer segments at precisely the point of interaction that the customer desires. Targeted offers can expand the individual customer portfolio of products in demand and exploit existing cross-selling potential within and between sales channels in order to increase the "share of wallet". At the same time, the cross-channel analysis of customer needs and the resulting bundling of information and services enables multiple customer loyalty based on a network of business relationships and interactions (Figure 21). More comprehensive customer service with a variety of interaction points means that customers are more systematically connected to the company than before.[15]

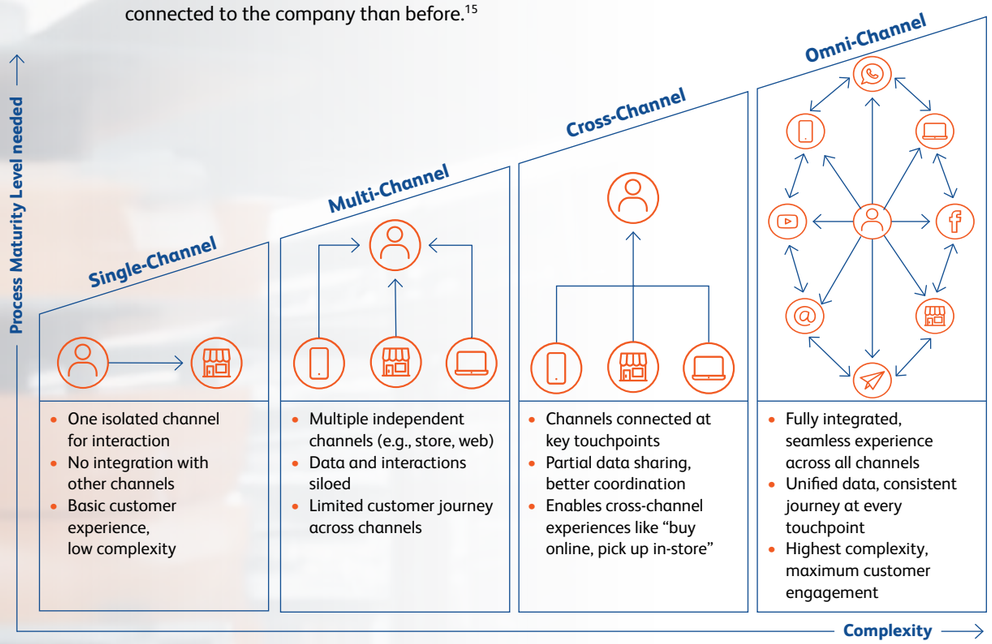

Figure 21 | From single channel to omnichannel with increasing complexity[16]

15 Gaston, G.: Making the Omni-channel Experience a Reality: Lessons from outside the industry, BAI Retail Delivery, Chicago 2014.
16 Marketing Tech Monitor 2025.

With the growing number of channels through which customers can interact with retailers – retail, online, call centers, kiosks, smart TV, mobile shopping – consumer demands are also increasing. Consistency across all channels affects not only the choice of channel and the interaction mechanisms offered, but also the quality of customer interaction in terms of "total customer experience management". Prominent examples such as *Starbucks* use of reinforcement learning and blockchains to implement a seamless, individualized customer journey based on data. The app generates tailored order suggestions based on customer behavior, stock levels and other contextual elements (such as the weather). Information about the order and the supply chain is provided via blockchain.

Lofty theoretical concepts usually fail due to practical issues, such as a lack of cross-functional end-to-end processes (12 %) or cross-functional synchronization of data in real time (14 %). To paraphrase *Theodore Roosevelt*, the motto for omnichannel is "*Keep your eyes on the stars, and your feet on the ground*." Omnichannel dreams usually shatter in reality due to costs and sheer integration complexity across processes and data (Figure 22).[17]

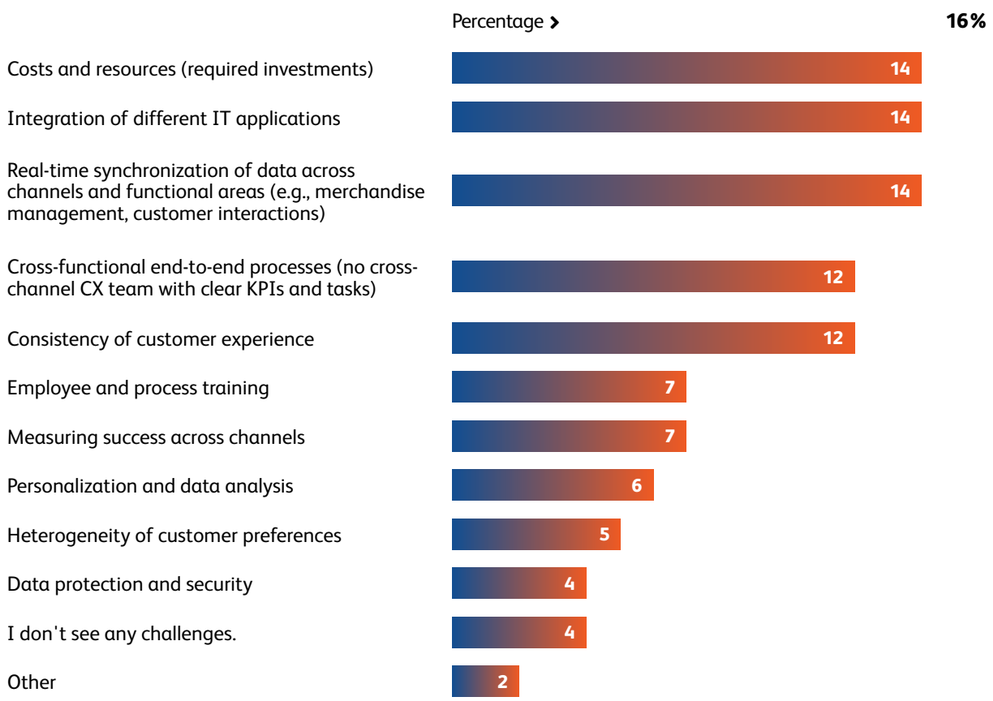

Figure 22 | Biggest challenge for implementing omnichannel (in percent, n=908)

Omnichannel maturity varies widely across European countries, influenced by differences in digital infrastructure, consumer behavior, retail landscapes, and regulatory environments. Northern and Western European markets tend to exhibit higher omnichannel sophistication, with seamless integration of online and offline touchpoints, advanced logistics, and data-driven personalization (Figure 23). Southern and Eastern European countries often show more fragmented omnichannel adoption, where strong physical retail remains dominant and digital channels are integrated more selectively. These differences reflect varying levels of investment, technological readiness, and organizational capabilities, resulting in distinct omnichannel strategies that are tailored to local market conditions and consumer expectations across Europe.

Prio. of Challenge	Austria	Hungary	Netherlands
1	Costs and resources (required investments) – 20 %	Cross-functional end-to-end processes (no cross-channel CX team with clear KPIs and tasks) – 13 %	Costs and resources (required investments) – 20 %
2	Cross-functional end-to-end processes (no cross-channel CX team with clear KPIs and tasks) – 14 %	Real-time synchronization of data across channels and functional areas – 12 %	Real-time synchronization of data across channels and functional areas – 9 %
3	Real-time synchronization of data across channels and functional areas – 10 %	Personalization and data analysis – 7 %	I don't see any challenges – 8 %

Prio. of Challenge	Portugal	Switzerland	UK
1	Consistency of customer experience – 18 %	Real-time synchronization of data across channels and functional areas – 16 %	Cross-functional end-to-end processes (no cross-channel CX team with clear KPIs and tasks) – 16 %
2	Real-time synchronization of data across channels and functional areas – 16 %	Costs and resources (required investments) – 8 %	Real-time synchronization of data across channels and functional areas – 14 %
3	Costs and resources (required investments) – 11 %	Personalization and data analysis – 5 %	Measuring success across channels – 7 %

Figure 23 | Comparison of the biggest challenges for implementing omnichannel across Europe (Mult Response, in percent, n = 843, statistically significant)

17 Quad: Eliminating Complexity for a Frictionless Marketing Experience, December 2024.

K RETAIL MEDIA AT A CROSSROADS:

NAVIGATING COMPLEXITY, FRAGMENTATION, AND THE RACE FOR SCALABLE AND MEASURABLE IMPACT

The hype surrounding retail or commercial media will continue unabated in 2026+: *IAB* forecasts that spending on retail media advertising will increase to €25 billion by 2026 in Europe alone … a growth rate of around 22.1 % compared to 6.1 % for the overall market.[18] The retail media sector in Europe has grown four times faster than the overall advertising market since 2023. This trend is expected to continue, with forecasts predicting a market value of €31 billion by 2028. 41 % of advertisers worldwide want to increase their advertising investment in retail media in 2025.[19] *IAB* forecasts growth of 15.6 % for retail media and 13.8 % for CTV already in 2025. Advertising revenue from retail media rose by 29 % to approximately US$4.4 billion already in 2024, driven by increasing demand from sellers, a growing market and strategic measures to expand its advertising reach.

18 IAB: Retail Media in Europe, Retail Media Definitions, November 2024.
19 Kantar: Marketing Trends 2024, Dezember 2024; Kenshoo/Skai: The State of Retail Media Report 2024.

The attempt to transform retail media into an economic low-energy zone is hardly in harmony with the movements currently observed among market participants (Figure 24):[20]

- **Emergence of retail media networks (RMNs):** Non-retailers are also building media networks and causing disruption in the retail media ecosystem. Due to an increased demand for first-party data, more companies will enter retail media. The balancing act always lies in the fluid distinction between the role of retailer and that of marketer.

- **AI:** enables the next generation of advertising automation and personalisation by improving functions such as pricing, merchandising and inventory management.

- **Lack of scale & reach:** Not every RMN will be able to stand out from the crowd and scale up. Most advertisers say they do not (want to) work with more than four (larger/relevant) retail data partners. The rest will either enter partnerships for shared data use or (have to) dissolve.

- **Programmatic advertising:** increases operational efficiency and automates the advertising purchasing process and advertising relevance (via data analysis) across all RMNs. Programmatic advertising simplifies the advertising purchasing process and enables advertisers to efficiently manage campaigns across multiple RMNs.

- **Strategic partnerships:** with traditional and social media platforms beyond retailers' properties, offsite growth is tapped into, as is closed-loop attribution with first-party data.

Segment	1. Advertising									2. Insights	3. Partner Programs	4. Content
Area	Onsite						Offsite					
Verticalals	Loyalty App	Website	Market-place	Shop	Mailing	Store	Extended Audiences	Social	Search			
Product (sample)	In-App Incentice, Display Ads	Display Ads, Brand page	Display Ads, Brand page, Sponsered Product Ads	Display Ads, Brand page, Sponsered Product Ads, package insert	Direct mail inkl. Targeting Newsletter-Integration	Digital Signage, OoH, car park, cash register receipt	Kombi external reach with retail Data, Display Ads inkl. OoH	Social Media Ads	Search Media, Shopping Ads	Campaign-, Shopper- & Brand-Performance	Display Ads, Brand Page	Content creation & enhance-ment
Driver	Reach	Visits	GMV	Revenue	Subscriptions	Customer Frequency	Reach	Reach	Reach	Customers	Incremental revenue	Customers
KPIs (sample)	Impr., Clicks	Impr., Clicks	Clicks, Sales	Clicks, Sales	NL openings, Clicks	Play-Outs, Retail Shopper	Impr., Views	Impr., Clicks	Impr., Clicks	Customer Behaviour	Clicks, Sales	Impr., View Time

Figure 24 | Segments and verticals of an omnichannel retailer offering in retail media (BVDW)[21]

- **Full-funnel advertising tool:** Expansion of position towards offsite to serve the full-funnel marketing goals of brand manufacturers. In the upper funnel, maximising reach means reaching the 95 % who are indifferent and/or outside the (existing) buyer base.

- **Retail media and first-party data:** supports improvements around first-party data, which is why retailers are investing in AI-supported CDPs, data lakes and data clean rooms, as well as loyalty programs.

- **Retail media-as-a-service:** To stand out from the competition, retail media networks are building self-service platforms for advertising customers, including budget optimisation, customizable target groups (selections) and reporting/analysis tools. The "managed service" model has so far proven to be hardly scalable.

- **Focus on a few (indispensable) AdTech partners:** Media partners will help to develop new advertising formats and provide advertisers with more accurate data.

- **From onsite to offsite:** After the first wave in the onsite sector, further development will be driven primarily by offsite – either retailer-managed or retailer data/self-service. Offsite advertising will play a greater role than onsite in the future.

20 Coresight Research: 10 Trends Shaping the Retail Media Market in 2025, January 2025.
21 BVDW Retail Media Guide, Oktober 2024, S. 16.

The more expertise companies have built up in implementing data-driven customer interaction, the more likely they are to cite a lack of synergies between online and offline Retail Media. Newbies tend to complain about a lack of in-house knowledge and cannot assess Retail Media really, in combination with insufficiently documented value contribution and access to the "data crown jewels" of retailers as well as the true value (Figure 25).

Figure 25 | Biggest challenges in Retail Media / Commerce Media (in percent, n=879)

Retail Media adoption and usage differ significantly across Europe, Asia, and Africa, reflecting varying levels of market maturity, digital infrastructure, and consumer behavior:

- In **Europe**, Retail Media is driven by established omnichannel retailers and strong data governance frameworks, with a focus on performance, transparency, and integration into broader media strategies (Figure 21).
- **Asia** leads in innovation and scale, leveraging super-app ecosystems, advanced e-commerce platforms, and real-time data to deliver highly personalized, commerce-driven media experiences.
- **Africa's** Retail Media landscape is emerging, shaped by rapid mobile adoption and fragmented retail structures, where growth is driven by mobile-first solutions, partnerships, and localized platforms rather than large, centralized retail networks.

The good news: media buying has been rated transparent by 64 % of companies across Asia, Africa, and Europe.

	Asia	Africa	Europe
I cannot assess this.	15,5 %	13,7 %	34,2 %
Unclear situation regarding data protection (GDPR), e.g., which data may be made available and in what form?	24,1 %	21,9 %	13,1 %
Unclear metrics (audience measurements)	36,2 %	35,6 %	21,6 %
Singular focus on online media, insufficient offline integration (in-store, out-of-home)	17,2 %	24,7 %	14 %

Figure 26 | Comparison of biggest challenges in Retail Media / Commerce Media between Asia, Africa, and Europe (in percent, n=879, statistically significant)

L ORGANIZATIONAL REALITY VS. TECHNOLOGICAL SPEED:

LINEAR THINKING IN AN EXPONENTIAL ERA

According to *Steve Jobs*, "*Great things in business are never done by one person, but by a team of people*." This highlights the advantages of (cross-functional) organisational structures, such as:[22]

"TALENT WINS GAMES, BUT TEAMWORK AND INTELLIGENCE WIN CHAMPIONSHIPS."
– Michael Jordan

- **Teamwork:** Ability to cooperate on changing tasks in different roles and across different functional areas.
- **Organisational Learning:** establishing a learning organisation as a means of continuously developing individual expertise, making the skills acquired available throughout the organisation and constantly adapting "organisational knowledge" to changing environmental and competitive structures.
- **Self-organisation:** a high degree of self-organisation on the part of employees and the organisational structure with scope for discretion, particularly in the context of implementing measures and activities. This is linked to the formation of a "trust-based organisation" by delegating responsibility to the lowest possible operational levels.
- **Flexibility:** ensuring sufficient organisational flexibility and speed in responding to market and competitive dynamics. Regarding employees, this includes making working hours, job content, qualifications and remuneration more flexible.
- **Customer-oriented culture:** substitution of formal organisational structures with distinctive "customer-oriented organisational cultures".
- **High speed of innovation:** as a willingness to respond quickly to changing market conditions and to rapidly introduce new products and services.
- **Promotion of internal entrepreneurship:** promotion of 'internal entrepreneurship' by creating greater entrepreneurial freedom, up to and including legal independence or loose forms of cooperation.
- **Dealing with uncertainty and ambidexterity:** Ambidexterity describes the simultaneity of conflicting aspirations torn between preserving and optimising the tried and tested ("exploit") ... and exploring new technologies and business models ("explore").

22 Tjosvold, D.: Cooperation Theory and Organisations, in: Human Relations, Vol. 37 (1984), pp. 743–767; Tjosvold, D.: Making a Technological Innovation Work: Collaboration to Solve Problems, in: Human Relations, Vol. 43 (1990), No. 11, pp. 1117–1131; Neck, C. P.; Manz, C. C.: From Groupthink to Teamthink: Toward the Creation of Constructive Thought Patterns in Self-Managing Work Teams, in: Human Relations, Vol. 47 (1994), No. 8, pp. 929–952; Daft, R. L.; Huber, G. P.: How Organisations Learn: A Communication Framework, in: Ditomaso, N.; Bacharach, S. (eds.): Research in the Sociology of Organisations, Vol. 5 (1987), pp. 1–36.

The challenge: organizations tend to evolve in a linear and incremental manner (if at all), shaped by established structures, processes, and governance models, while technology advances at an exponential pace (Figure 27).

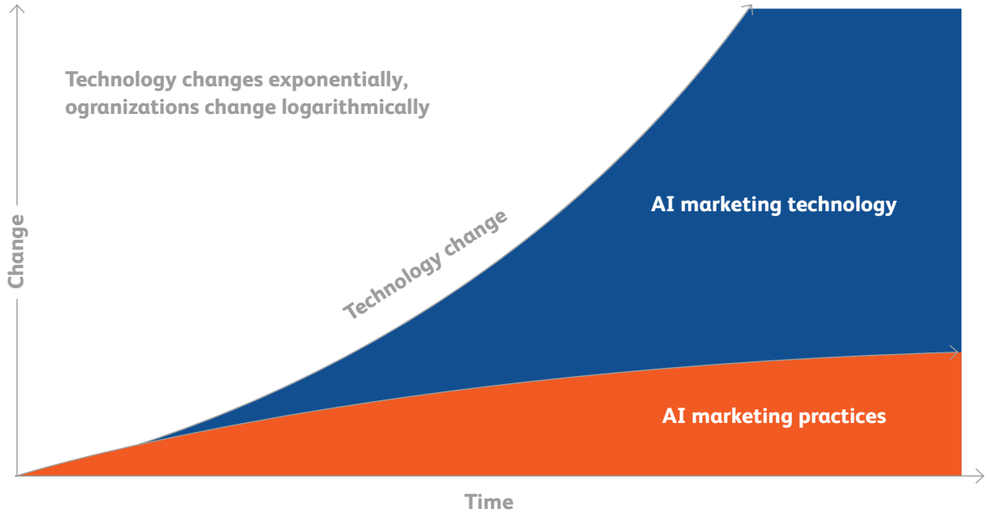

Figure 27 | Development of organizations vs. AI-driven technology according to *Brinker*[23]

This growing asymmetry creates increasing tension between organizational readiness and technological potential, as systems, skills, and decision-making frameworks struggle to keep up with rapid innovation cycles. As a result, the true challenge is no longer access to technology, but the ability of organizations to adapt fast enough to harness its accelerating impact. Therefore, technologies are developing exponentially, while the organisation is developing logarithmically at best, mostly lacking know-how in terms of **capabilities**. A capability in this sense describes a stable, modular and self-contained function for a specific purpose. It is either business-related (business capability) or technical (IT capability) in nature and encapsulates various elements

- Organisation (e.g. departments, roles, committees).
- Processes (e.g. activities, procedures, methods).
- Information (e.g. business objects, rule data, specialist knowledge).
- Resources (e.g. IT, tangible & intangible assets).

23 Brinker, S.: Martec's Law: Technology changes exponentially, organizations change logarithmically, in: ChiefMarTech, 2025.

Capabilities are classified into non-overlapping levels, such as core vs. non-core, differentiating vs. commodity, in-house vs. outsourced, strategic vs. tactical vs. operational, or customer-, partner- and employee-related.24 Across the world, when asked for critical capabilities, customer insights (17 %), internal cross-functional collaboration between marketing and sales (15 %), and data analytics (12 %) are leading the pack (Figure 28).

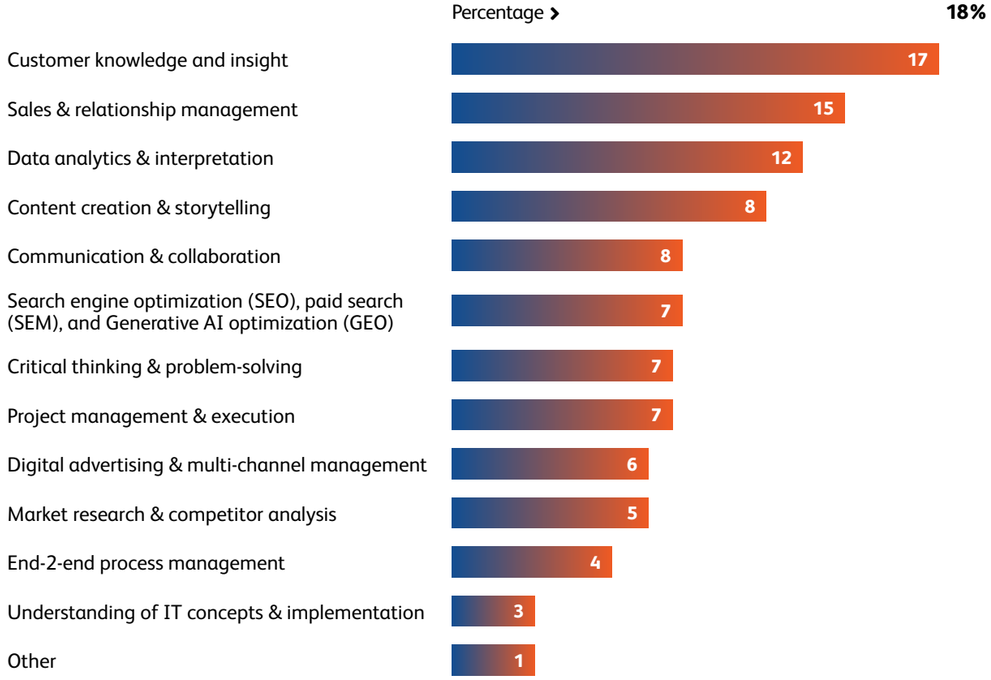

Figure 28 | Most critical marketing & sales capabilities for company's success in 2026 (in percent, n=777)

It is therefore even more surprising that managers themselves – as well as companies – make comparatively little effort to build up the necessary competences, for example through **training** (Figure 29). A dedicated skills & competencies framework is missing in almost 90 % of the companies across Europe, Asia, and Africa … with no differences between the regions. The topic is rarely addressed systematically and in a structured manner in training programmes.

24 Knoth, N.; Decker, M.; Laupichler, M. C.; Pinski, M.; Buchholtz, N.; Bata, K.; Schultz, B.: Developing a holistic AI literacy assessment matrix – Bridging generic, domain-specific, and ethical competencies, in: Computers and Education Open, 6/2024.

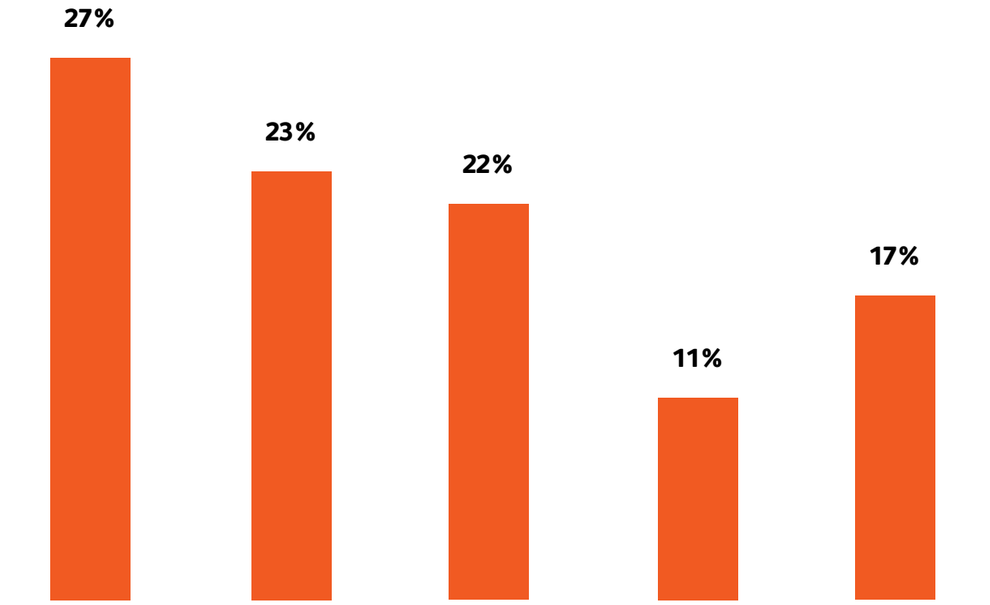

Figure 29 | Dedicated programme & budgets for enhancing skills & competencies (n=777)

The almost schizophrenic chicken-and-egg problem: the exchange of experience requires experienced and competent dialogue partners which, however, can hardly exist without a corresponding system and the teaching of specific skills. In the opinion of decision-makers, further postponement of the training requirements that are unanimously proclaimed as necessary goes hand in hand with the risk of recklessly gambling away existing competitive advantages. The (fig leaf) will is there, but the (implementing) flesh is hardly willing. In a similar way, the *World Economic Forum Future of Jobs* report from January 2025 expects the main demand for learning and education in areas such as "AI and Big Data", "Technological Literacy", paired with "Creative Thinking".[25]

25 World Economic Forum: The Future of Jobs Report 2025, January 2025.

WHY PROJECTS FAIL …
THE "ROCKY HORROR PROJECT SHOW" CONTINUES

The *Kafka* parable "*Before the Law*" is about a great opportunity in life that is wasted because of a lack of courage to recognise it and therefore seize it. "*Before the law (or project success) stands a gatekeeper. Only: today's guardian of successful project implementation wears neither a fur coat nor a Tartar beard. He goes by the name of "practical constraints*". However, knowing what is necessary, he suspects that behind the gate there is no bourgeois salon waiting, but often the forecourt to hell:

- A survey of 252 CIOs shows that only just under 46 % of projects are classified as successful and deliver the expected ROI.[26]
- According to Capterra, almost two-thirds (61 %) of marketing software buyers have regretted a software purchase in the last 1-2 years. Marketing/sales software is the second most important investment across all categories (28 %), after IT security (32 %).[27]
- Analysts unanimously estimate that up to 85 % of AI projects fail before or after deployment, which is twice as high as for traditional enterprise applications.[28]
- The establishment of multi-agent systems already fails to deliver the desired results in more than 31 % of cases. The reasons: insufficient specifications/requirements, insufficient integration/coordination between agents and a lack of task verification.[29]
- 73 % of users become hooligans of an opposing team when it comes to their own CRM applications.[30]
- 90 % of all CRM projects fail … and often result in a "Transylvanian project bloodletting" called "reversal".[31]

26 Userlane: The State of Digital Adoption report, March 2023
27 Captera: Capterra's 2024 Tech Trends Report: Insights From Marketers To Watch, 5 October 2023.
28 Bojinov, I.: Keep Your AI Projects on Track, in: Harvard Business Review, November-December 2023; Goldfoot, J.: MIT just proved why 95 % of AI projects are failing (and how design leaders can fix it), in: Medium, August 19,2025; Challapally, A.; Pease, C.; Raskar, R.; & Chari, P.: The GenAI Divide: State of AI in Business 2025, MIT Media Lab's Project NANDA, Boston 2025.
29 Cemri, M.; et al.: Why Do Multi-Agent LLM Systems Fail?, in: UC Berkeley, 17 March 2025, in: arXiv:2503.13657.
30 Miller, A.: 63 % of CRM Initiatives Fail, in: DM News, 17 July 2013; Blum, G.: 20 Reasons Why CRM Software Fails, in: CRM Tech World, 23 May 2024.
31 Edinger, S.; Why CRM Projects Fail and How to Make Them More Successful, in: Harvard Business Review, 20 December 2018.

“HOWEVER, IT STILL FALLS SHORT OF EXPECTATIONS, WITH 54.9% OF RESPONDENTS REPORTING DISAPPOINTMENT IN ITS (MARTECH) PAYOFF, A 6%+ INCREASE FROM SPRING.”[32]

The problems with implementation and use are more likely to be a projection of other challenges, such as inadequate project planning, imbalances in operational processes, or a requirements analysis that is insufficient in terms of content and detail. Success or failure are usually already embedded in the project's DNA “by definition” at the start of the project. Overall, only 9 % of companies say they have invested sufficient time in all phases and areas of action of an AI project.[33] The most common mistakes in the development of strategies and their implementation are just as complex as they are diverse in their causes and effects (Figure 30):

- **"Too much, too soon" (33%):** Too many projects are tackled at the same time, which inevitably leads to "bogging down". Multitasking may have long since become obsolete as proof of personal commitment, but it usually has fatal consequences for the quality of individual projects and the state of mind of those involved in the project.

- **Insufficient functional/technical expertise (22%):** inadequate knowledge and understanding as well as insufficient insight on the part of those involved regarding the desired overall system. And, very often, a lack of or insufficient knowledge in the specialist area about detailed process flows and the resulting requirements. To paraphrase *Napoleon*, "*Chance* may *be the only legitimate ruler of the universe*." ... but is hardly helpful for successful projects.

- **Lack of/unclear objectives (22%):** If you don't know the goal, no path is the right one: unclear objectives prevent effective project results from the outset. To paraphrase *Mark Twain*, the credo "*As soon as we lose sight of the goal, we redouble our efforts*" often applies.

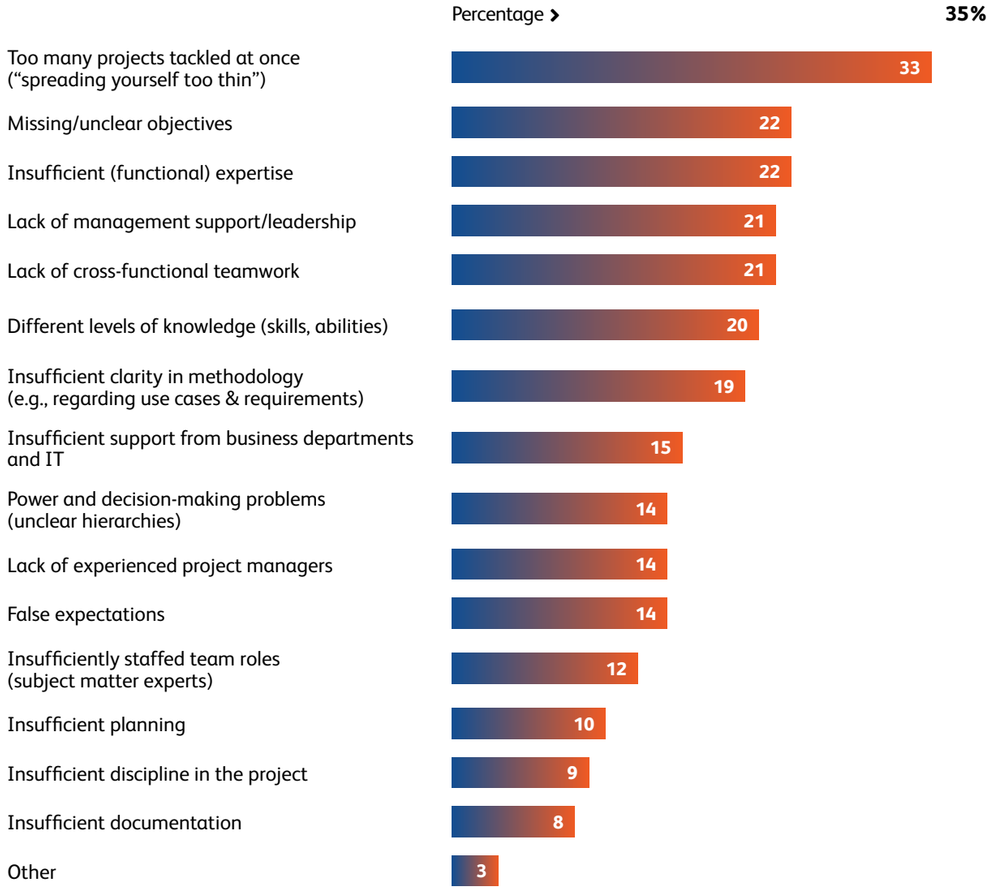

Figure 30 | Biggest challenges in project implementation (in percent, n=783)

32 Mourao, A.: Martech disappointment grows despite increased usage, in: MarTech, 9 January 2025.
33 Liu; E.: Why Do AI Projects Fail?, in: Towards Data Science, 30 April 2024; Iris AI Innovations: Why Do AI Projects Fail? A Deep Dive into the 85 % Failure Rate, in: Medium, 29 July 2024; Ferguson, P.: Why AI Projects Fail and How to Ensure Success. Strategies for success in AI implementation, in: Clearlead AI, 25 June 2024.

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