Capgemini
RESEARCH INSTITUTE

From complexity to clarity

How CMOs can reclaim marketing to build competitive edge.

Make it real.

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Executive summary

Reclaiming marketing: A movement for the new era

Over the past decade, like other functions, marketing has seen a relentless push toward digital. Marketers have shifted focus from creativity to data and from brand to dashboards. Technology-driven initiatives and projects dominate the new marketing agenda. COVID-19 accelerated digitalization: everything needed to be done remotely, using more platforms, more tools, and more metrics. Marketing became a machine that organizations could run from anywhere. Human interaction became optional – but, as a consequence, marketing's soul has started to slip away.

Now, data is everything. AI and large language models (LLMs) are changing the game. But this intersection of creativity, process, and technology is messy and unstructured. In trying to cope with the new demands, teams are stretched thin. Talent is hard to retain. There is an urgent need for clarity. In all this chaos, customer-centricity and engagement are suffering.

In the face of ongoing economic uncertainty, leaders are telling their marketing functions to chase growth, enlarge the customer base, and boost sales. They must market not just to customers, but to the agents and algorithms also. Our survey shows that almost seven in 10 chief marketing officers (CMOs) say that expectations of their role from leadership and other functions are continuously rising. But when tech stacks are fragmented, budgets are under pressure, and the team is juggling too many priorities, how can marketers respond to these expectations?

The truth: It's been a demanding journey, marked by major challenges and swift change

Marketers are overwhelmed. The tools at their disposal are powerful, but the vision of where they will take organizations is fractured. Robust strategy, integrated data, and skilled talent are not yet in place, limiting AI's impact. Marketing is not telling the stories that matter. Our latest 2025 findings show only 7% of marketing leaders strongly agree (and 19% somewhat agree)* that AI has boosted their effectiveness.

** Throughout the report, 'strongly agree' data reflects respondents who have selected 5 on a scale of 1-5; and 'somewhat agree' data reflects respondents who have selected 4 on a scale of 1-5.*

Executive summary

The call to marketers: Reclaim your marketing to build competitive edge

For marketers, this is a pivotal moment to reconnect with the human-centric, forward-looking craft of marketing. Marketing must reclaim its role, not just as a support function, but as the architect of customer experience (CX) and enterprise growth. CMOs must lead the charge in reclaiming marketing to build competitive edge, shifting the focus from operational complexity to strategic clarity. It's time to turn away from distractions and align fragmented data, technology, talent, and resources around a unified vision. With this clarity comes sharper decision-making, storytelling that resonates, customer engagement that converts, and a competitive advantage that endures.

Read more to learn how you can do it.

We'd like to extend our sincere thanks to our panel of industry executives for sharing their valuable insights with us.

Aaron Mitchell
VP of membership and personalization, LEGO Group

Claire-Louise Green
VP EMEA Enterprise Marketing, Adobe

Claudia Willvonseder
Member of Executive Board, Dr. Oetker with responsibility for Marketing, Sustainability and Research & Development

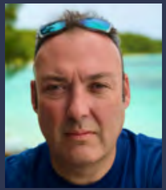
David Hirsch
General manager, Marketing & customer insights, QBE Insurance

François Renard
ex-global CMO, Renault

Frederique Covington Corbett
Chief, Global brand & marketing, UNICEF

Heather Hartridge
Director of global marketing excellence and innovation, Twinings

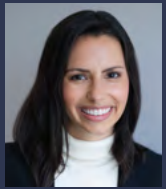
Himanshu Khanna
CMO, Raymond Lifestyle



Ian McGregor
CMO, Green Man Gaming

Jessica Padula
VP of Marketing & Head of sustainability, Nestlé Nespresso SA

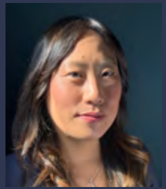
Jolanda Bakker
Director of marketing and sales, Vattenfall



Katherine-Margaux Longest
AVP Digital, Naturium

Marieke Rentmeester
Global marketing director for the Horeca channel, Friesland Campina

Nicola Scirocco
Former CMO of North Europe Region, PRYSMIAN



Patricia Jurca
Chief Brand Officer, KeyBank

Peter Burns
Director of Marketing and Digital, Heathrow airport

Katie Lilly
CMO, Antelope

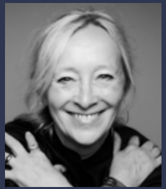
Kaustubh Chandra
CMO & Head of Digital Sales Group, Airtel Business

Linda Ha
Global Marketing Manager, IKEA Retail

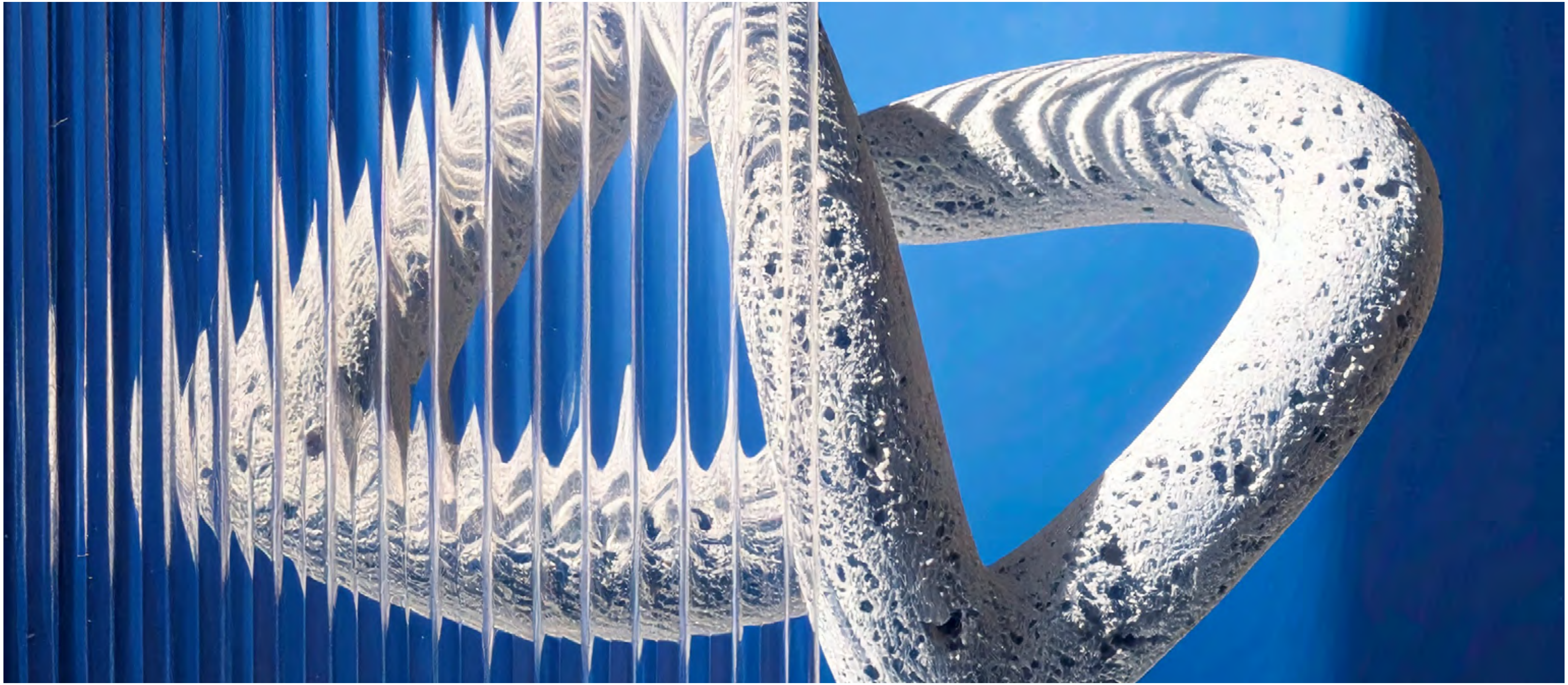
Márcio Carvalho
CMO, Claro Brazil

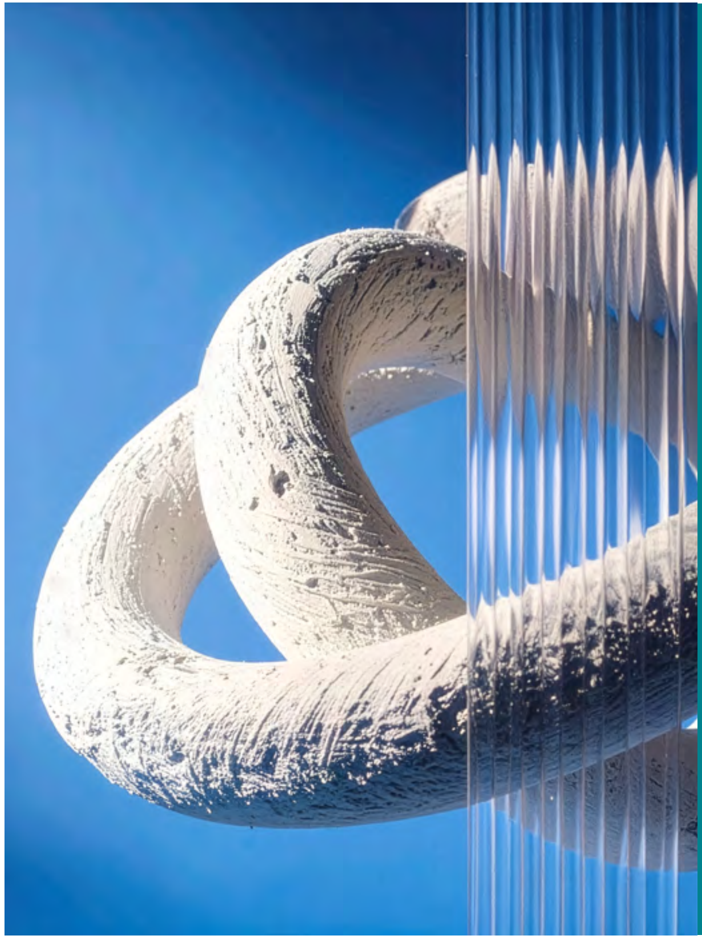
Peter Markey
ex-CMO, Boots

Terrence Wiggins
Global marketing director, Cook Medical



Yolanda van Die
CMO, Centraal Beheer





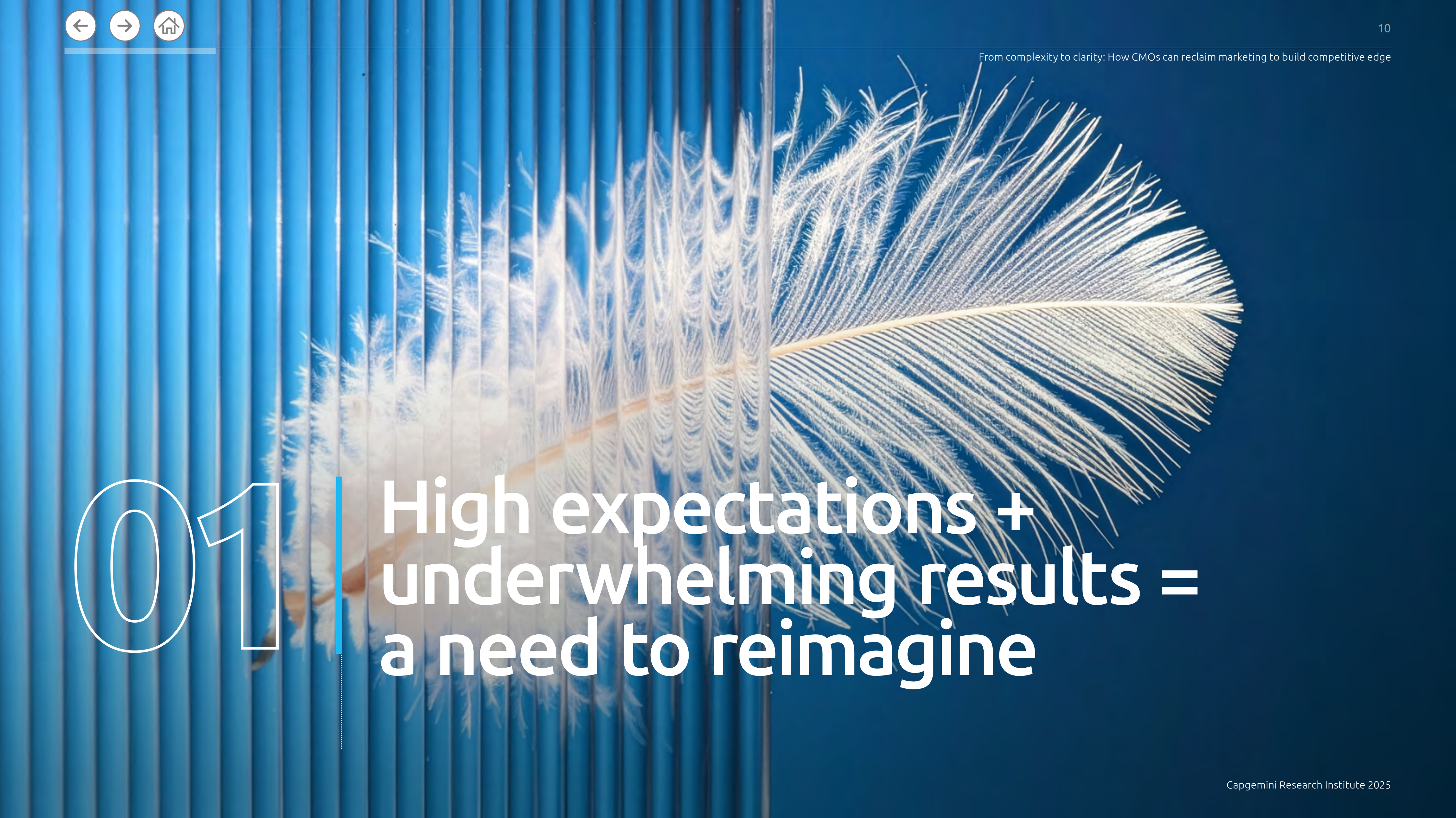
Who should read this report and why?

This report is intended for marketing leaders across industries, especially CMOs, chief brand officers, chief customer officers, and chief experience officers, as well as other senior marketers driving strategic transformation. It also offers valuable insights for CEOs, growth and sales leaders, and technology heads who support marketing modernization. For consultants and advisors specializing in marketing strategy, digital transformation, and AI adoption, the report serves as a practical guide to the current marketing landscape.

This study, the third in the CMO playbook series, explores the evolving role of CMOs and the transformative impact of generative and agentic AI on marketing. It empowers stakeholders to unlock value through hyper-adaptation, customer-centricity, and operational excellence. By offering actionable insights, the report seeks to reposition marketing from traditional support function to strategic driver of growth. It also delivers an overview of how AI technologies are reshaping marketing operations. It highlights practical use cases, real-world challenges, and the strategic imperatives that organizations must address to stay competitive and future-ready.

The report is based on:

- The findings of a survey of 1,500 respondents from the marketing function (director-level and above) from 15 countries
- 29 in-depth interviews with leading CMOs/ marketing leaders.



01 High expectations + underwhelming results = a need to reimagine

The marketing function stands at a crossroads. While expectations of chief marketing officers (CMOs) and their teams have never been higher, outcomes are increasingly falling short.

Proof points of this disconnect are everywhere:

- **Budgets remain constrained** even as expectations rise, forcing marketing to do more with less and prioritize short-term wins over long-term brand value.[1]
- **CMOs' influence is waning** within executive leadership, with marketing's strategic voice often unheard around the top table.
- **Marketing technology (martech) ownership and influence is blurring.** Organizations are grappling with a martech landscape marked by rigid and overcrowded technology stack; poor AI integration across end-to-end workflows, unclear roles and value from external partners and lack of clarity on governance across ownership, budget, roadmap, usage, and optimization. As a result, martech and AI investments have failed to deliver expected returns. These issues signal that the traditional playbook is no longer fit for purpose. There is an urgent need not just for incremental improvement, but for a fundamental reimagining of the marketing function.

Expectations of CMOs are rising

Nearly 7 in 10 (68%) CMOs that we surveyed report rising expectations of their role across the business. Claudia Willvonseder, Member of the Executive Board at Dr. Oetker with responsibility for marketing, sustainability, and research and development, says: *"The CMO role today extends beyond traditional marketing communications to include product development, innovation, and driving top-line growth, reflecting broader expectations for business impact."*

Kaustubh Chandra, CMO & Head of Digital Sales Group at Airtel Business, confirms this evolution in the B2B space: *"Over the past five years, I've observed a transformation of B2B marketing from a support function to one that, together with sales, can drive the growth agenda. The main goal is to contribute at least 25% to overall order book value, emphasizing measurable impact on business growth."*

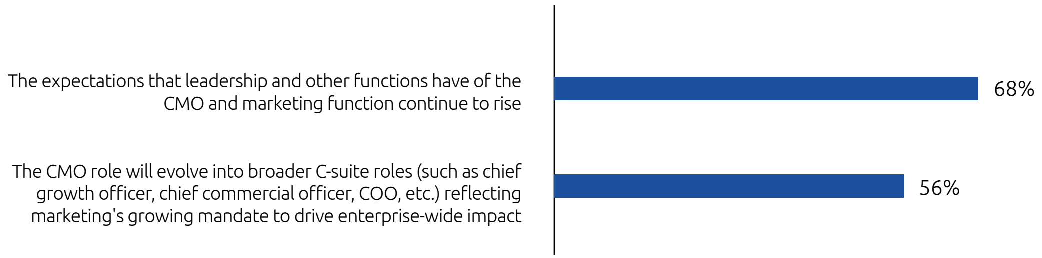
Over half (56%) of CMOs believe their role will evolve into a range of broader C-suite roles (chief growth officer, chief commercial officer, COO, etc.), reflecting marketing's mandate to drive enterprise-wide impact.

"The CMO role today extends beyond traditional marketing communications to include product development, innovation, and driving top-line growth, reflecting broader expectations for business impact."

Claudia Willvonseder,
Member of Executive Board at Dr. Oetker with responsibility for Marketing, Sustainability and Research & Development

Figure 1.
The C-suite expects CMOs to drive growth

Percentage of respondents who agree with the below statements



Source: Capgemini Research Institute, CMO Playbook #3 research, June–July 2025, N = 399 CMOs.

Marketing spend averages just 5% of total revenue.

Despite high expectations, decision making authority is weak

Constrained budgets

While marketing's responsibilities expand, budgets are constrained. In organizations with over $1 billion in annual revenue, marketing spend averages just 5% of total revenue. In organizations with annual revenue of $10 billion–$20 billion, it is just over 6%. Returns are also becoming harder to realize as organizations face growing competition for attention and consumers develop 'ad fatigue.' Moreover, the cost of customer acquisition is rising – Google Ads' average cost per lead increased by 25% in just one year.

Half of surveyed CMOs say they are increasingly focused on "doing more with less." As Ian McGregor, CMO at Green Man Gaming, puts it: *"Driving conversions and maintaining consistent ROI is becoming more challenging. With margins under pressure, we have to get creative, finding smarter, leaner ways to deliver impact."*

This has led to a relentless focus on short-term results, often at the expense of long-term brand building and customer loyalty. Leadership demands clear, immediate return on investment (ROI) for every dollar spent.

Only 28% of marketing leaders agree that their leadership is open to long-horizon marketing investments, indicating a high degree of risk-consciousness and a prioritization of cost containment.

Marketing's voice is missing from decision-making

Between 2021 and 2023, the percentage of CMOs involved in critical decision-making increased from 59% to 70%. However, this trend reversed in 2025, with only about half (55%) of CMOs participating in key decision-making processes, indicating a decline in their strategic influence.

Unsurprisingly, CMOs are under-represented at Board level. A 2024 study shows that, across the Fortune 1000, marketers occupy less than 5% of all Board seats.[2]

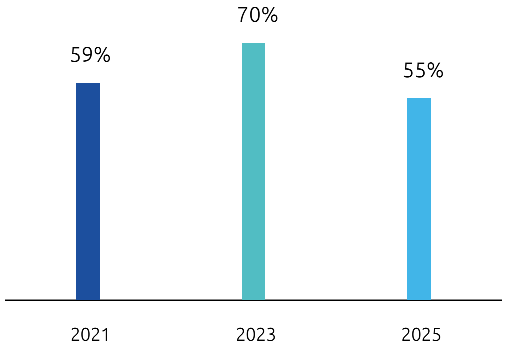
Further, among the top 100 organizations in the Forbes Global 2000 list, only 44% list their CMOs*[3] as part of their executive leadership team, much lower than the percentage taken by counterparts such as COOs**[4] and CFOs.***[5]

28%

of marketing leaders agree that leadership is open to long-horizon marketing investments

Figure 2.
The CMO's influence has declined

Percentage of CMO respondents who agree with the statement:
Our CMO is involved in critical decisions



Source: Capgemini Research Institute, *CMO Playbook #3* research, June–July 2025, N=399 CMOs; Capgemini Research Institute, *CMO Playbook #2* research, N = 348 CMOs; Capgemini Research Institute, CMO survey, March–April 2021, N = 224 CMOs.

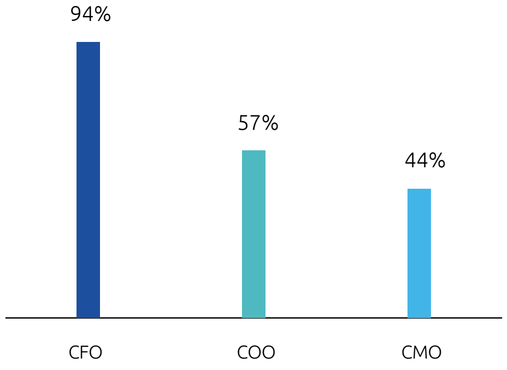
Yolanda van Die, CMO at Centraal Beheer, a Netherlands-based insurance organization, also discusses the complexity and authority of the CMO role: *"The marketing role is becoming more complex. The CMO role is unique in its broad stakeholder view and therefore important in today's world. But the CMO does not always have a seat at the executive table. We need to better align with business and speak the financial language."* The CMO of a leading global bank adds: *"Many people still equate marketing with advertising. This perception can be very limiting for the marketing team, because we are much more than just advertising – it is a full funnel."*

7%

of marketing leaders strongly agree that they have boosted marketing performance through AI.

Figure 3.
Marketing lacks a seat in the C-suite

Percentage of organizations that feature CMOs/CFOs/COOs as part of their executive leadership team on their official websites



Source: Capgemini Research Institute analysis; N = top 100 organizations in the Forbes Global 2000 list in 2025.[6]

Martech ownership and underperformance

Many marketers see Gen AI as an engine of growth, with 59% believing it will deliver significant ROI. But performance to date has been difficult to showcase/measure, with only 7% of marketers strongly agreeing (and 19% somewhat agreeing) that they have boosted marketing performance through AI.

Responsibility for AI and martech initiatives is currently more often in the hands of the CIO than the CMO. This means CMOs must collaborate more closely in order to gain input within a complex ecosystem. As per our survey data, 39% of marketing leaders say that Gen AI and agentic AI marketing initiatives are funded by the marketing function, while 55% say they are funded by the IT function.

In 2025, the average martech budget allocated as a percentage of the overall marketing budget has also fallen, to 22%,[7] from 25% in 2023, and 27% in 2021.

Where it is the nominal gatekeeper of the martech budget, marketing often lacks control and authority to deploy it as it sees fit. Patricia Jurca, Chief Brand Officer at KeyBank, says: *"Even though the martech budget comes from marketing, marketing lacks full control over it, as other teams like procurement, tech, etc. are also involved."*

Excerpts from interview with

Jessica Padula,

VP, Marketing and Head of Sustainability at Nestlé Nespresso

Q: How has the CMO role changed?
More precise marketing metrics mean that marketing is held to increasingly high standards as a financial driver. The role is more accountable for measurable business outcomes, with marketing now expected to show qualifiable financial impact.

Q: Have marketing's influence, resources, or authority changed?
Increasingly, marketing leaders are involved in strategic decision-making, but their influence often lags behind that of commercial and finance teams, especially when short-term priorities dominate. But organizations shouldn't judge investments in brand building solely on short-term sales results. There must be a strategic balance between brand building and performance.

Q: Which skills are most important in future marketing leaders?
Marketers must be able to interpret data, use it to craft compelling narratives, and guide strategic decisions. Building functional capabilities that blend psychological brand insight with business acumen and data expertise is also crucial. Additionally, marketers need to be comfortable with financial metrics and concepts such as P&L [profit and loss], as they are increasingly expected to validate their strategies and outcomes with robust financial analysis.

There must be a strategic balance between brand building and performance.

02 Inefficiencies, gaps, and areas of misalignment in the marketing ecosystem

The weaknesses in today's marketing infrastructure illustrated in the previous chapter are clear signals that the current trajectory of the function is unsustainable. The sections below unpack the causes behind these trends, exploring the operational, strategic, and capability challenges that must be addressed to reclaim marketing's influence and impact.

Strategic misalignment

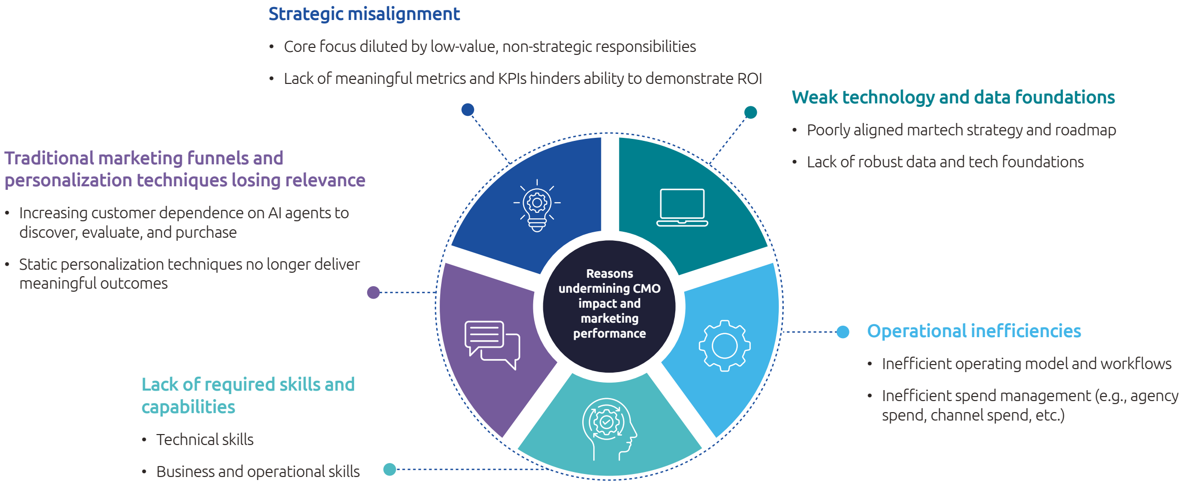
Low-value, non-strategic responsibilities dilute core focus
As its core focus becomes diluted by a growing list of non-strategic responsibilities, marketing's strategic impact is increasingly weakened. Internal analysis based on client experience suggests that 20–30% of current marketing activities are non-value-adding and should sit outside the function. Despite the rise of automation, only 15% of marketing leaders completely agree (and another 23% somewhat agree) that low-value tasks are automated, leaving the majority of teams bogged down by manual work, which prevents them from focusing on high-impact areas such as brand building, innovation, and customer connection.

Only 15%

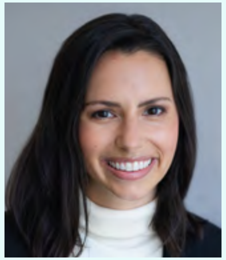
of marketing leaders completely agree that low value tasks are automated, allowing them to focus on high-impact tasks

Figure 4.

CMO influence is constrained by marketing ineffectiveness



Source: Capgemini Research Institute analysis.



"Investing in AI and tools to drive efficiency is important, but it's not the definitive solution. Real progress comes from clarity of purpose and a disciplined focus on how to achieve it."

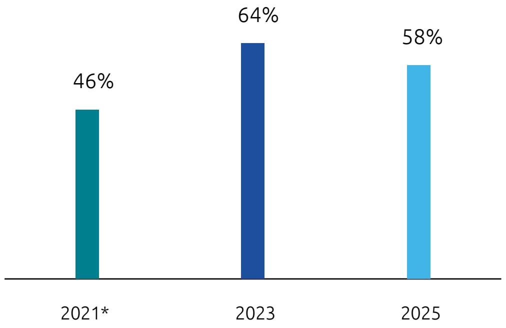
Katherine-Margaux Longest
AVP Digital at Naturium

While the proportion of respondents who believed that marketing holds end-to-end responsibility for CX increased from 46% in 2021 to 64% in 2023, this figure declined to 58% in 2025. This reversal underscores a diminishing emphasis on core marketing priorities. Similarly, generating actionable insights for other functions, a key strategic marketing imperative, is a core KPI for only 19% of respondents, while, for 43%, it is not even a focus area. At industry level, consumer products organizations perform better than their peers in many other sectors in identifying actionable insights, yet the KPI figure remains low, at just 26%.

Compounding this issue is the fact that marketing is often held responsible for KPIs over which they don't have authority. For example, while 72% of CMOs are accountable for e commerce sales as a core KPI, only 47% have direct authority over the area. (Back in 2015, Gartner found that 62% of companies reported that digital commerce rolls up to CMO.)[8]

Figure 5.
In 2025, fewer CMOs are accountable for CX

Percentage of respondents who agree that CMOs/heads of marketing are accountable for CX



Source: Capgemini Research Institute, *CMO Playbook #3* research, June–July 2025, N = 1,500 organizations; Capgemini Research Institute, *CMO Playbook #2* research, Sep–Oct 2023; N = 1,800 organizations; Capgemini Research Institute, CMO survey, March–April 2021, N = 1,600 organizations.
*Includes only B2C numbers.

Lack of meaningful metrics and KPIs hinders ability to demonstrate ROI
While marketing performance is easily measured, outcomes related to customer loyalty, emotional connection, and brand resonance are more difficult to quantify. Kate Muddle, CMO of Business Services at Capgemini, highlights the need for balance between performance marketing and brand building: *"It's always a balance of building a strong brand and supporting the growth of the business through sales."* Only 42% of marketing leaders say they have the right metrics in place to measure the long-term value of the marketing programs.

According to a report from Direct Marketing Association, based on more than 1,500 campaigns, 39% of the metrics currently used by marketers are considered 'less meaningful,' focusing on subjective indicators such as 'impressions' and 'reach,' which do not reflect business outcomes.[9] This lack of clarity makes it increasingly difficult for CMOs to demonstrate marketing's strategic contribution.

Weak technology and data foundations

Poorly aligned martech strategy and roadmap
As Gartner reported, in 2015–16, 33% of marketing budgets were allocated to technology, surpassing spend on external services such as advertising and consulting (32%). This tech-first momentum led to a proliferation of tools and platforms, often adopted without a clear framework.[10] The result was a fragmented martech stack, underutilized investments, and weak martech-business alignment. In fact, one in three organizations report a lack of clear alignment between marketing technology initiatives and business goals. A former CMO at an American retail chain, emphasizes the importance of strategic alignment: *"The tech solutions you bring to the table have to solve a problem."* Misaligned martech strategies, disconnected pilots, and failure to prioritize the right use cases often lead to poor outcomes, duplication of resources, and increased costs.

Katherine-Margaux Longest, AVP Digital at Naturium, a US skin care brand, adds: *"Investing in AI and tools to drive efficiency is important, but it's not the definitive solution. Real progress comes from clarity of purpose and a disciplined focus on how to achieve it."* Snapchat illustrates the risks of adopting new technology without a clear business rationale. Once a Gen Z favorite, the platform stumbled in 2023 with the launch of My AI, a chatbot powered by OpenAI. Instead of adding value, customers saw My AI as intrusive and poorly integrated. Ratings on iOS dropped to 1.67 stars, and searches for 'delete Snapchat' spiked by nearly 500%.[11]

The CMO of a leading global fashion brand, stresses the need for strategic use case selection in AI: *"Rapid adoption pressures can lead to irreversible decisions while selecting the right technology investments, especially AI. Leaders must be deliberate in choosing which use cases to pursue."*

In fact, Gartner predicts that **at least 30%** of Gen AI projects will be abandoned after proof of concept (PoC) by end-2025, owing to poor data quality, inadequate risk controls, escalating costs, or unclear business value.[12]

1 in 3

organizations lack clear alignment between marketing technology initiatives and business goals

Excerpts from interview with

Aaron Mitchell,

VP of Membership and Personalization for the LEGO Group

Q: How do you justify investments in marketing?

Marketing can help lead the growth agenda - driving both immediate impact and long-term success, it is critical we position ourselves as a strategic investment that inspires the organisation to embrace a forward thinking, value creation mindset.

Q: How is personalization evolving, and what should brands prioritize to stay relevant?

The core goal of personalization hasn't changed: it's always been about building direct, lasting relationships with customers by offering valuable experiences. However, what's rapidly evolving is how personalization is enabled with advancements in technology, data, and CRM capabilities, making it possible to deliver more contextual and relevant campaigns. The focus is shifting to a more human-centric approach or a "one-to-moment" personalization. This means using data to understand the mission a consumer is on, and responding in real-time to help them move forward in their journey.

Q. How can restructuring the operating model drive greater marketing efficiency and effectiveness?

We, at LEGO, have established our own internal CRM hub. This move has enabled us to become completely self-sufficient. Functioning as a shared marketing service across the organization is enabling us to fast-track campaigns; sometimes in as little as 36 hours.

> **The focus is shifting to a more human-centric approach or a "one-to-moment" personalization.**

Lack of robust data and tech foundations
Nearly 64% of the respondents surveyed cite an overcrowded stack with overlapping tools and systems as a key barrier to effectively harnessing data. Furthermore, 31% acknowledge that their stack of marketing tools and technologies is underused.

The challenge is further amplified by difficulties in accessing and utilizing internal data. According to our survey, only 30% of organizations are effectively using internal data from sources such as sales, customer feedback, and consumer history in their marketing efforts. A marketing leader at a leading bank states: *"It's actually easier for me to access data from my paid channels. Retrieving data internally can sometimes be more challenging due to the size and complexity of our organization."*

Operational inefficiencies

Inefficient operating model and workflows
Marketing must evolve from a siloed function to a strategic orchestrator of enterprise-wide collaboration. As Aaron Mitchell from LEGO puts it, *"Unlocking the full potential of the marketing value chain means bringing the whole organization together—working cross-functionally to solve consumer challenges and create greater, shared value."*

In practice, marketing remains fragmented and under-integrated. Instead of acting as a strategic enabler, it often operates in isolation, limiting its ability to scale impact, align with business priorities, and drive operational efficiency.

The absence of cross-functional collaboration is a major barrier to delivering a unified CX. Only 36% of respondents say marketing successfully partners with sales, product development, and operations.

Further, 42% of marketing leaders report that their current structure leads to duplication of effort and investments across geographies and business units. This fragmentation, marked by siloed teams, overlapping tools, and non-value-adding activities, makes it increasingly difficult for CMOs to be agile and decisive.

Inefficient spend management (e.g., agency spend, channel spend, etc.)
Media agencies (65%), advertising, creative, and content agencies (61%), and digital marketing and SEO agencies (51%) are a few of the leading third parties with which the marketing function is seeking to partner. But our survey shows that only 26% of organizations are satisfied with the value and returns provided by external vendors/agencies. Many organizations operate with fragmented agency ecosystems, often resulting in duplication of effort, inconsistent processes, and inflated costs. Katie Lilly, CMO at US pet care platform Antelope, explains the challenges: *"Outsourcing to agencies or third-party hubs is common but often frustrating, as these partners may not fully understand the business or provide personalized service."*

Today organizations allocate nearly 61% of their marketing budget to in-house investments and the remaining 39% to outsourced marketing investments. Over the next two to three years 86% of organizations plan to increase insourcing, and 48% plan to increase outsourcing.

Lack of skills and capabilities
Today's marketers are expected to be fluent in emerging technologies, data analytics, customer journey mapping, and agile methodologies. Claudia Willvonseder at Dr. Oetker states: *"There is a growing need for data analytics and digital skills in marketing, along with the curiosity and adaptability to learn and unlearn as technology evolves."*

The skills shortage extends to a lack of relevant business and operational skills, including domain-specific AI literacy (e.g., marketing teams understanding how agentic AI can reshape campaign planning or customer journeys), as well as change management and governance capabilities to scale initiatives responsibly. As Abhii Parakh, Head of Customer Experience at Prudential Financial, comments: *"Marketers have shifted from content creators to strategic architects who set direction and orchestrate AI systems."*

Only 30%

of organizations are effectively using internal data in their marketing efforts.

Only 33% of respondents agree (and only 9% strongly agree) that they have the required tech skills to address future needs. And just 27% agree (and only 5% strongly agree) that they have the business skills needed to meet future demands. While technical fluency remains a challenge, the even wider gap in future-fit business skills, such as change management, and governance, underscores that being future-ready is not just about mastering technology, but also about evolving strategic and operational capabilities.

Traditional marketing funnels and personalization techniques are losing relevance

Increasing customer dependence on AI agents to discover, evaluate, and purchase
Customers can now enter and exit marketing funnels at multiple points, influenced by social media, peer reviews, AI-driven recommendations, and non-linear digital journeys. As large language models (LLMs, such as ChatGPT) become the primary interface through which customers discover, evaluate, and even purchase products, the traditional role of websites is rapidly eroding. Patricia Jurca at KeyBank states: *"If an AI avatar becomes your most trusted confidant, then the way you get information about anything is radically different."* Gartner predicts a 50% decline in organic traffic by 2028,[13] a clear signal that customers are no longer starting their journeys on brand-owned platforms.

This shift introduces a critical problem as websites must now also address algorithms as well as people. LLMs are becoming the new gatekeepers of product discovery and recommendation. If a brand's content is not structured in a way that LLMs can understand, interpret, and trust, it risks being excluded from the customer consideration set altogether.

Static personalization techniques no longer deliver
As LLMs and AI agents enable product discovery based on context, intent, and conversation, traditional personalization techniques lose relevance. Current martech and data strategies fail to use real-time signals to seamlessly integrate AI/Gen AI and dynamic content delivery into the workflow. Our survey findings suggest that only 18% strongly agree (and another 32% somewhat agree) that they successfully personalize customer interactions to boost customer engagement and outcomes. While the banking industry (with 23% strongly agreeing) and retail sector (with 22% strongly agreeing) lead in personalizing customer interactions, their success rates remain modest. In contrast, industries such as media and life sciences lag significantly behind, with only 7% strongly agreeing to this success.

According to recent Adobe research, 71% of customers want brands to anticipate their needs and provide personalized offers, yet just 34% of businesses are doing this effectively. Further, only 15% of brands are delivering digital experiences that genuinely delight customers.[14]

With the stricter global privacy laws, marketers are facing reduced access to granular consumer data. As at February 2025, around 82% of the global population was protected under national data privacy laws, with 144 countries having enacted such legislation.[15] While some browsers have already phased out third-party cookies, Google Chrome, which holds 65% global market share has only recently begun the process.[16] By using live behavioral signals, semantic content analysis, device and location signals, consent-based first-party data, etc., instead of historical tracking, marketers can deliver relevant experiences without compromising compliance. Contextual, cookie-free personalization not only respects user privacy but also enables scalable, relevant and meaningful engagements that build trust and drive performance.

For example, the contextual advertising platform WeatherAds uses real-time signals like weather, location, and time of day to enable brands such as Heineken and Google to deliver highly relevant ads without relying on third-party cookies. For instance, on a rainy evening, users might see ads for comfort food or streaming services. This approach has led to significantly improved performance, including click-through rates up to five times higher and conversion rates that have doubled, demonstrating how contextual engagement can drive better conversion outcomes.[17]

Excerpts from interview with

Linda Ha,

Global Marketing Manager for IKEA Retail

Q: How are you addressing the rising costs of marketing and ensuring effectiveness?
Marketing budgets aren't increasing at the same rate as media inflation, and that impacts effectiveness. In the home furnishing industry, the competition has intensified. That's why it is crucial to have more control and visibility over our data, so we can make smarter budgeting and marketing technology investment decisions.

Q: What is your approach to hyper-personalization and customer data?
We have incredibly rich customer data, but hyper-personalization isn't needed at every touchpoint. It's more about understanding where it will be most effective. We're using our data to provide relevant inspiration while respecting customer boundaries.

Q: What do you see as the future of the marketing function?
I think there's a misconception that the new marketing competencies will be purely technical and that Gen AI will replace creative functions. The shift I see is toward a marketing setup that integrates creative, technical, and strategic skills for targeted, effective campaigns.

There's a misconception that the new marketing competencies will be purely technical and that Gen AI will replace creative functions

03 AI promises transformation but impact is lacking – so far

Technologies like generative AI (Gen AI) and agentic AI are helping marketers turn massive, unstructured datasets into actionable insights, driving smarter decisions and deeper customer understanding, as well as enhancing performance and impact measurement through AI-powered attribution models.

Agentic AI, in particular, can orchestrate cross-channel engagement, format brand content for LLM discoverability, enable hyper-contextual personalization at scale, and automate repetitive tasks. This shift empowers marketing organizations to move from manual execution to strategic orchestration, unlocking exponential gains in efficiency, precision, scalability, and relevance.

One of the many areas where this shift is beginning to take shape is the content supply chain. A well-integrated content supply chain aligns people, processes, and technology to deliver personalization across formats and channels, laying the foundation for measurable impact and sustained marketing performance. To fully unlock its potential within the content supply chain, organizations must first address fragmented data foundations, standardize workflows, and invest in automation to eliminate manual, repetitive tasks.

Our survey indicates that organizations eventually expect to realize 2.3x ROI[18] from their agentic AI/Gen AI marketing initiatives, but as of now returns have fallen short of expectations. In the following sections, we delve into the potential of Gen AI and agentic AI, the current adoption trends – and the reasons for the disappointing outcomes to date.

Organizations eventually expect to realize 2.3x ROI from their agentic AI/Gen AI marketing initiatives

Definitions

Artificial intelligence (AI) is a collective term for the intelligent capabilities in learning systems, typically categorized into machine vision and sensing, natural language processing (NLP), predicting and decision-making, and acting and automating.

Generative AI (Gen AI) is a subset of AI that harnesses the power of transformer models and massive scaling of data and compute to plan, reason, and create generative features, including text, image, and video.

AI agents/agentic AI: AI agents are programs/platforms/software that are connected to the business environment. They operate within a defined boundary, make decisions autonomously, and act to achieve specific goals with or without human intervention. **Agentic AI** is a broader term and includes systems, platforms, practices, tools, and technologies that enable agents to function.

Gen AI has already won significant investment and adoption across marketing use cases

Gen AI is becoming central to modern marketing strategies. In 2023, only 37% of large organizations (with over $1 billion in revenue) were using Gen AI in their marketing functions. According to our latest survey, this number has since surged to 72%. Our survey also highlights that B2C organizations are leading, with 75% adopting Gen AI compared with 65% of B2B organizations. At the same time, the percentage of organizations that are not using Gen AI (including those who are taking a wait-and-watch approach or have a strategy in place but haven't yet executed) has fallen drastically, from 33% in 2023 to 8% in 2025.

Additionally, Gen AI as a percentage of martech investments has increased from 64% in 2023[19] to as much as 79% in 2025, according to our survey findings.

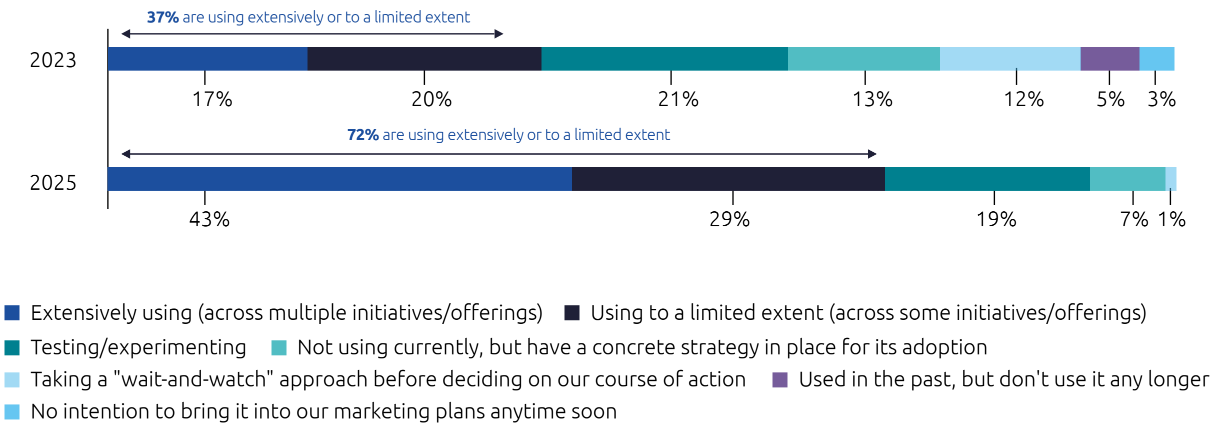
72%

of organizations are using Gen AI extensively or to a limited extent in their marketing department

Figure 6.

Marketing embraces Gen AI

Which statement best describes the usage of Gen AI in your marketing department?



Source: Capgemini Research Institute, *CMO Playbook #3* research, June–July 2025, N = 1,500 organizations; Capgemini Research Institute, *CMO Playbook #2* research, Sep–Oct 2023, N = 1,800 organizations.

Every marketing sub-function is tapping into the power of Gen AI to drive efficiency, precision, and innovation. Our survey indicates that in 2025 more than three-quarters of organizations use Gen AI for content creation, customer segmentation and targeting, and digital marketing.

Through its collaboration with Adobe, US cosmetics retailer Ulta Beauty is able to produce personalized content at scale. *"Generative AI is improving productivity by around 30%, owing to tools such as Microsoft Copilot. We're excited about where this technology can take us in terms of creating even more meaningful customer interactions,"* comments Mike Maresca, CTIO at Ulta Beauty.[20]

Terrence Wiggins, Global Marketing Director at Cook Medical, shares: *"At our company, we've built a Gen AI chatbot that uses real-world company data. It helps us access information and make better business decisions. We use it for content creation, predictive analytics, and other decision-making processes – all powered by our internal data."*

Kaustubh Chandra from Airtel Business highlights the relevance of Gen AI to the organization's marketing initiatives: *"AI has been instrumental in enhancing customer intelligence for product recommendations and messaging. It has allowed us to create highly personalized campaigns and right pitch for different customer personas."*

77%

of organizations use Gen AI for content creation

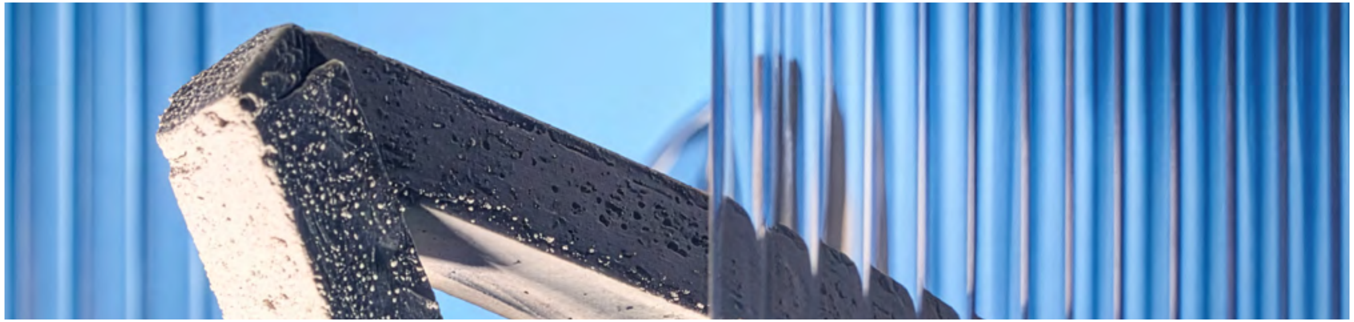
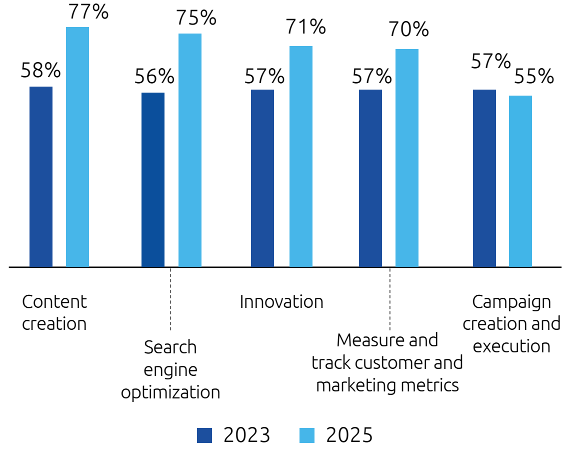


Figure 7.

Gen AI adoption in different marketing use cases

Percentage of organizations using Gen AI in their marketing use cases in 2023 and 2025



Source: Capgemini Research Institute, *CMO Playbook #3* research, June–July 2025, N = 1,500 executives with marketing responsibilities from unique organizations; Capgemini Research Institute, *CMO Playbook #2* research, Sep–Oct 2023; N = 1,112 executives with marketing responsibilities from unique organizations who are using generative AI.

Table 1

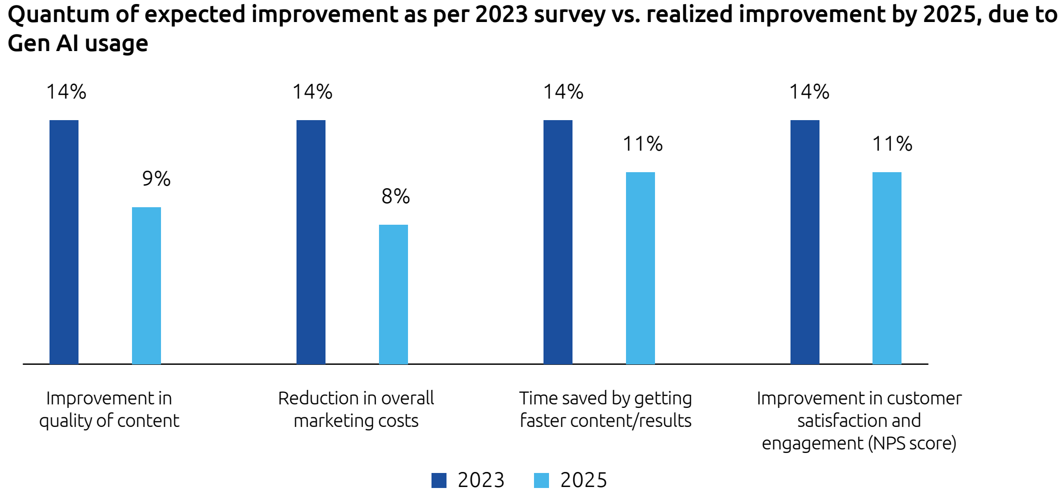
Examples of Gen AI enhancing performance across marketing metrics

Company	Approach	Benefits
Cadbury	"Just a Cadbury Ad" campaign used Gen AI to create thousands of localized video ads featuring a popular Bollywood star, tailored to promote local stores across India.	Took hyper-local engagement to the next level at minimal cost. Resulted in a reach of 140m+, created 2,500+ unique ads, and saw a 32% engagement spike.[21]
Kraft Heinz	Introduced TasteMaker, a custom-built retrieval-augmented generation (RAG) engine to scale content creation and personalization.	Slashed design timelines for its product content from weeks to hours, reducing time by 8x and personalizing at scale.[22]
Standard Chartered Bank	Used ChatGPT for marketing concept development and Adobe Firefly for design execution for campaigns.	Resulted in significant improvement in campaign velocity, creative asset creation, and operations: 150% growth in total campaigns; 133% growth in total assets; 21% reduction in average working days per campaign from 2023 to 2024.[23] The ultimate target is to reduce from 21 to 5 days.
Zalando, a leading European online fashion and lifestyle retailer	Used AI-generated marketing imagery and digital twins of models for its photoshoots.	Replaced costly photoshoots with fast, budget-friendly visuals, cutting imagery production time from 6–8 weeks to 3–4 days and reducing costs by 90%.[24]
Rocky Brands, a footwear and apparel company	Implemented AI-powered tools for SEO, content optimization, and performance tracking.	Increased organic search revenue and new user acquisition through SEO optimization: 30% increase in search revenue,74% year-on-year revenue growth, and 13% increase in new users.[25]
Versuni, a consumer electronics organization (formerly Philips Domestic Appliances)	Implemented Adobe Firefly and Creative Cloud tools to accelerate product development, cut creative costs, and scale content production.	Enabled faster experimentation, cross-functional collaboration, and agile content adaptation across global markets. Resulted in 63% reduction in product time to market; 60% cost savings on creative production and photoshoots; 50% faster image sourcing and asset creation.[26]

But, for many, Gen AI benefits remain elusive

There is a gap between expected and realized benefits across various parameters. Overall, impact has fallen short of the expectations outlined in our 2023 survey.

Figure 8.
Gen AI hasn't yet delivered as expected



Source: Capgemini Research Institute, *CMO Playbook #3* research, June–July 2025, N = 648 organizations that are using Gen AI extensively in marketing; Capgemini Research Institute, *CMO Playbook #2* research, Sep–Oct 2023, N = 1,800 executives with marketing responsibilities from unique organizations.

Agentic AI holds transformative promise for marketing

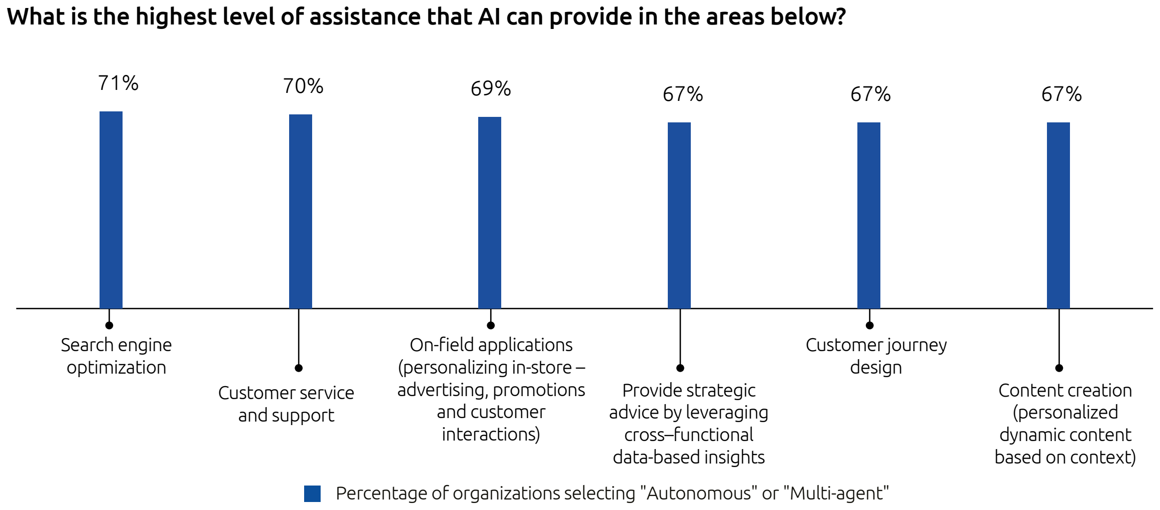
From accelerating campaign execution to optimizing content creation and enhancing customer journeys, agentic AI has the potential to touch the entire marketing value chain. Nearly seven in 10 marketing leaders agree that autonomous or multi-agent AI could be applied to varied marketing use cases like SEO and content creation.

~70%

marketing leaders agree that autonomous or multi-agent AI could be applied to varied marketing use cases like SEO and content creation

Figure 9.

Nearly seven in 10 marketing leaders agree that autonomous or multi-agent AI could be applied to varied marketing use cases



Source: Capgemini Research Institute, *CMO Playbook #3* research, June–July 2025, N = 1,356 organizations that use agentic AI extensively or to a limited extent or are testing/experimenting.
Note: For this research, we classify an autonomous level of AI assistance and multi-agent level of AI assistance under agentic AI, while basic and semi-autonomous level of AI assistance is classified under assisted/augmented AI.

The figure below illustrates the potential of agentic AI across marketing use cases:

Figure 10.

Agentic AI can not only elevate traditional marketing but also enable new capabilities

Level 1
Business process

Traditional marketing

Illustrative list of use cases

Level 2 Sub-processes	**Market research & intelligence**	**Brand management**	**Marketing innovation**	**Content marketing & creation**	**Digital marketing & social media**	**Affiliate program management**	**Customer journey Design**	**Customer segmentation and targeting**
Agentic AI use cases	Conversational insight discovery	Compliance and brand safety monitors	Autonomous ideation and concept testing	Real-time personalized content generation	Real-time website personalization	AI-driven affiliate optimization	Contextual and dynamic journey mapping	Predictive audience targeting
	Simulation of market scenarios	Brand consistency scanners		Content optimization	Contextual search and navigation	AI-powered influencer matching	Dynamic user personas creation	
	Sentiment analysis			Multi-format repurposing engines	Autonomous media buying			
	AI-enhanced marketing analytics							

Resulting in

Operational efficiencies + Capacity unlock for higher value add tasks + Enabling innovation and growth

to be cont.

Illustrative list of use cases

Level 1 Business process	**Traditional marketing**						**Expanded responsibilities***	
Level 2 Sub-processes	**Advertising, offers, & promotion**	**Campaign creation and execution**	**Event marketing and sponsorships**	**PR and corporate communications**	**Lead Generation, qualification, and cross-sell/Upsell**	**Measurement and tracking of marketing metrics**	**Customer experience management**	**On-field applications**
Agentic AI use cases	AI-driven product discovery	Real-time campaign adjustment	Audience intelligence and segmentation	Real-time reputation management	Predictive sales forecasting	Sales performance analytics	Proactive customer interaction	Sales agent augmentation
	Product recommendation engines	AI-powered campaign orchestration	Automated and real-time engagement	Intelligent crisis communication	Automated sales outreach	Customer purchase behavior analytics	Predictive customer outreach	Real-time sales support
	AI-based dynamic pricing	Automated product content optimization	AI-led sponsor matching and outreach		AI-driven lead scoring	Automated feedback loops	Customer experience intelligence	Guided self-service
					AI-powered sales negotiation		AI-driven issue resolution	AI-driven in-store assistance
								Automated checkout processes

Resulting in

Operational efficiencies + Capacity unlock for higher value add tasks + Enabling innovation and growth

*enabled by agentic AI

Source: Capgemini Research Institute analysis.

A recent study by the Capgemini Research Institute found that AI agents could deliver a 40% reduction in operational costs and a 44% improvement in customer satisfaction (These are enterprise-wide statistics and not marketing-specific).[27]

Qualcomm offers a compelling example of agentic AI in action across various use cases. The market research and analytics team has reduced its workload by 30–40% by automating data analysis and insight generation. AI agents also help create tailored messaging across product lines, generating landing pages, emails, and social media content in seconds, saving hours of manual effort each quarter. Its marketing team reviews over 1,200 trademarks faster and more accurately using AI agents. As Jeremy Krall, Senior Director of Marketing Technology at Qualcomm, puts it: *"AI is not just a tool; it's a fundamental shift in how we approach marketing."* He emphasizes that integrating AI across all facets of marketing is key to building seamless and intuitive customer journeys.[28]

Bob Bastian, Prudential's Chief Information and Technology Officer for Global Retirement and Insurance, comments: *"Agentforce is going to allow us to give our teams superpowers. We can automate back-end work, allowing employees to focus on keeping customer promises and driving profitable growth."*[29] Using agentic AI, Prudential's sales teams is already saving half a day per week.

Beyond operational efficiency, agentic AI can extend marketing's impact. It can provide dynamic recommendations for new and complementary products based on real-time customer context, preferences, and purchase history, transforming e-commerce with hyper-personalized upselling at scale. It can also accelerate sales by suggesting or autonomously executing next best actions (NBA), from follow-ups to scheduling meetings and automatically generating tailored first-draft proposals, while freeing up representatives to focus on closing deals.[30]

Furthermore, organizations can create new product and design offerings around agentic AI. For example, Airbnb is using agentic AI to predict market trends and user behavior, allowing it to adjust campaigns, personalize recommendations and offers, and enabling hosts to make real-time pricing adjustments. It is it overhauling its business model to provide a one-stop "everything travel" app, where it harnesses agentic AI to handle accommodation but also experiences, restaurants, and, eventually, other services. An AI agent can support the user through the entire trip, with bespoke recommendations for tours, events, and restaurants in real time.[31]

Multi-agent systems (MAS) are not limited to executing tasks within a functional domain. They can break down organizational silos; e.g., when a campaign is launched, different AI agents can predict its impact on sales, mobilize inventory planning, and activate supply chain adjustments in real time. These agents can coordinate a marketing campaigns with operational readiness to deliver on them.

H&M has deployed AI agents to analyze customer interactions and sales data to drive personalized outreach and optimized inventory. These agents have driven higher conversion rates and improved customer satisfaction. The H&M Customer Experience Team confirms: *"H&M's AI agents have enabled us to better understand and serve our customers, driving stronger sales and satisfaction."* They also resulted in reduced inventory waste and fewer stockouts.[32]

But marketing leaders remain wary

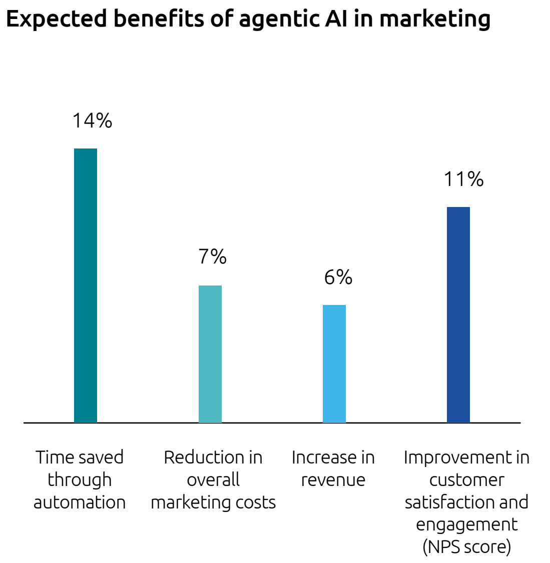
Despite the strong potential of agentic AI, most organizations remain cautious. Based on our survey data, we estimate that only around 27% are currently testing/experimenting/using any form of agentic AI in marketing. Further, only around 5% have experimented with MAS for their marketing use cases. This reflects a significant missed opportunity.

This may reflect the finding that organizations have mellowed expectations of agentic AI, at least for the near term.

Around 27%

are currently testing/experimenting/using any form of agentic AI in marketing.

Figure 11.
Organizations have muted expectations of agentic AI in marketing



Source: Capgemini Research Institute, *CMO Playbook #3* research, June–July 2025, N = 1,423 organizations that use agentic AI extensively or to a limited extent or are testing or have an agentic AI strategy in place.

In fact, Gartner predicts that over 40% of agentic AI projects will be canceled by the end of 2027, as organizations fail to advance beyond pilot phases owing to unclear business value and misplaced use cases, among other reasons.[33] (We discuss the other key reasons for low adoption and low benefits in the next sub-section).

What's behind the Gen AI and agentic AI potential vs. outcome gap?

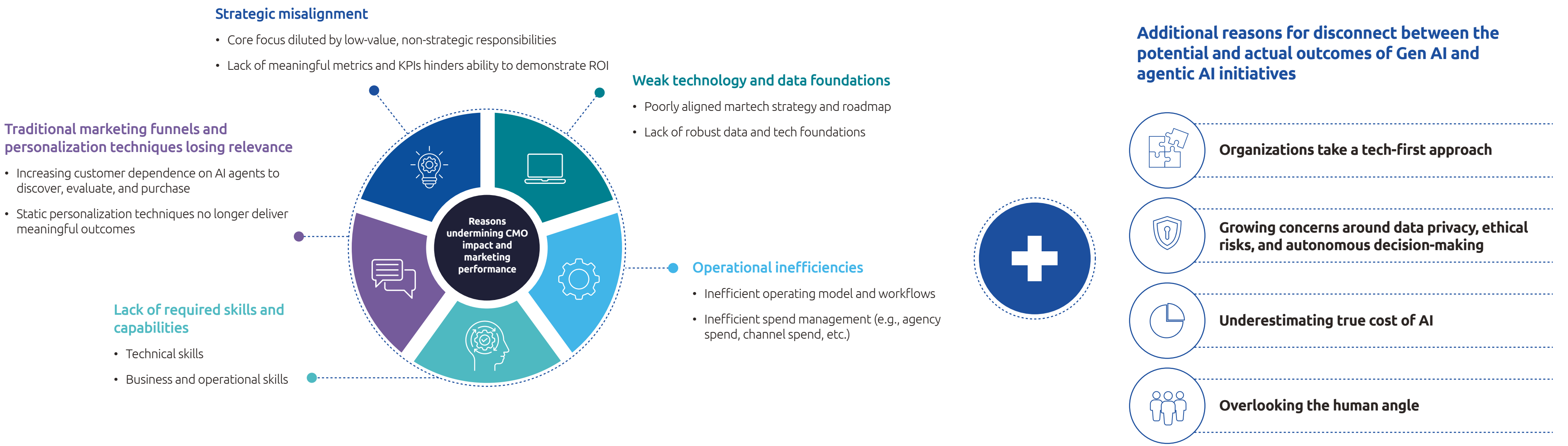
Our survey findings show that three to four years is needed to generate positive returns but organizations often abandon their initiatives prematurely. Furthermore, 60% of organizations that are testing or experimenting with Gen AI pilots report challenges to scaling.

47%

of respondents view decisions made by AI agents as untrustworthy and a risk to brand reputation.

Gen AI and agentic AI implementations also face hurdles including failure to assess the true cost of AI implementations, risk, and compliance challenges, and the tendency to overlook the human angle(see Figure 12.)

Figure 12.
Reasons for the Gen AI and agentic AI outcome gap

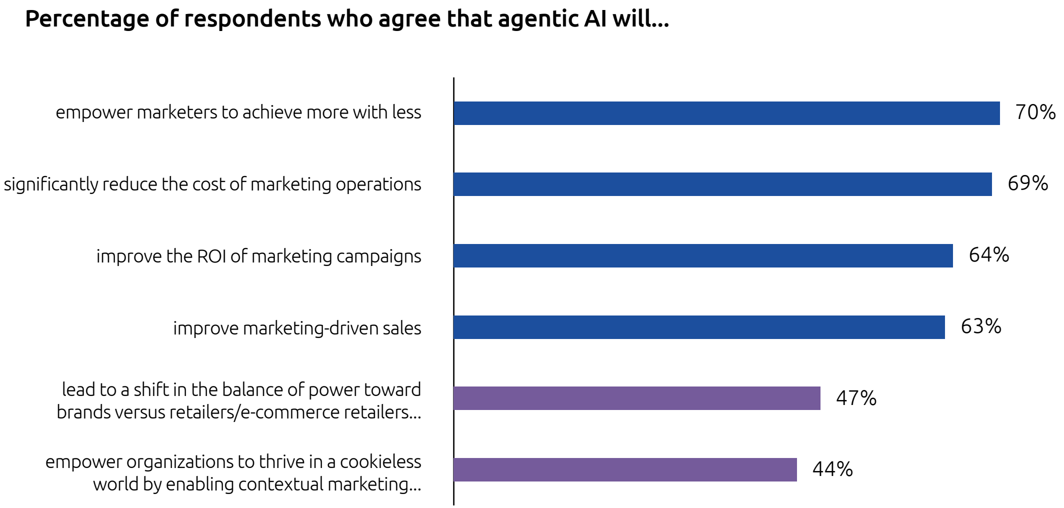


Source: Capgemini Research Institute analysis.

- **Organizations take a tech-first approach** When implementing AI tools, organizations may hesitate to pursue transformational changes to workflows and ways of working due to a narrow vision and/or to avoid the disruption and complexity involved.[34] As a result, many organizations consequently use AI for short-term and incremental gains, rather than using these technologies strategically to redesign workflows and unlock new sources of revenue and innovation.
- **Many organizations are failing to harness AI's full potential** owing to growing concerns around data privacy, ethical risks, and trust in autonomous decision-making. A significant 59% of respondents cite the risk of jeopardizing data privacy and security as a major barrier to implementing agentic AI. A similar proportion are concerned about the ethical implications of deploying autonomous systems. Additionally, around 47% of respondents view decisions made by AI agents as untrustworthy and a risk to brand reputation. A lack of off-the-shelf agentic AI tools for marketing (61%) is also a turn-off.
- **Organizations often underestimate the true investment and operational demands.** Beneath the visible costs lie substantial infrastructure and computational expenses, talent acquisition challenges, and significant software and licensing fees. According to Gartner, the costs can escalate by 500–1,000% between pilot and production phases.[35] Operationally, these technologies introduce complex barriers to integration,

Figure 13.

Most organizations fail to understand agentic AI's transformational potential



Source: Capgemini Research Institute, *CMO Playbook #3* research, June–July 2025, N = 727 organizations that have deployed agentic AI extensively or partially.

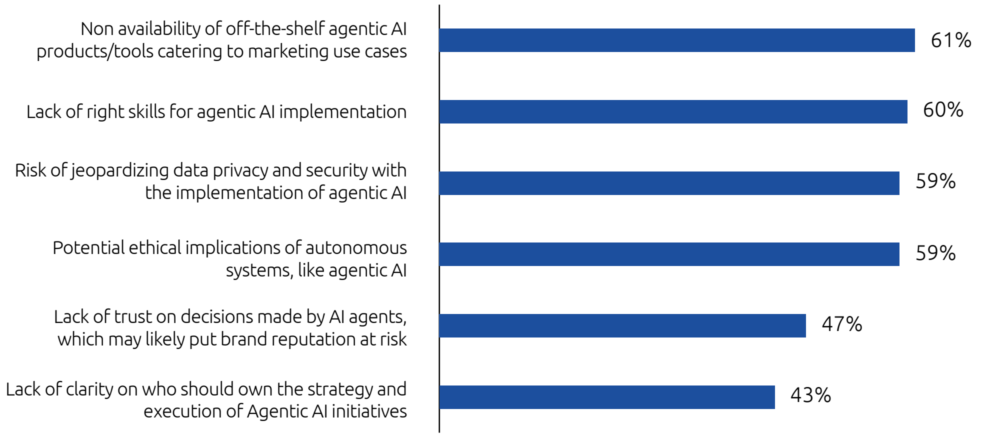
ongoing maintenance burdens, and the critical challenge of user adoption, severely hindering scalability.

- **Overlooking the human angle** is emerging as another key pitfall. While these technologies offer unprecedented real-time engagement and autonomous decision-making, they frequently lack the ability to truly connect with customers on an emotional level. For example, The Coca-Cola Company's use of Gen AI to recreate its iconic 1995 holiday commercial, 'Holidays Are Coming,' initially garnered enthusiastic consumer feedback. However, it later faced notable criticism for "lacking warmth" – a common shortfall in AI-generated visuals.[36]
  Himanshu Khanna, CMO at Raymond Lifestyle, says: *"In a landscape dominated by data, brands often forget the power of emotional resonance. In the rush to produce daily content and constant novelty, emotional consistency is slipping away. To truly strengthen the brand for the long term, emotional resonance must lead the way."* There is also the danger of brands falling into the 'AI sameness trap' – using AI tools to create overly similar content and campaigns.
- **Lack of human-AI 'chemistry'** across key workflows is another barrier. Most organizations admit they are not prepared for dynamic human-AI collaboration. Two-thirds agree that they will need to restructure their teams to promote it.[37] Additionally, 61% of organizations report rising employee anxiety about the impact of AI agents on their employment prospects, and over half believe (52%) (respondents from strategy and HR functions) AI agents will displace more jobs than they create.[38]

Figure 14.

Agentic AI adoption struggles owing to missing turnkey tools and low trust

Percentage of organizations associating the below challenges with agentic AI adoption in marketing



Source: Capgemini Research Institute, *CMO Playbook #3* research, June–July 2025, N = 1,500 organizations.

Most organizations admit they are not prepared for dynamic human-AI collaboration.

Interview with

Frederique Covington Corbett,

Chief, Global Brand & Marketing at UNICEF

Q: How are the roles and expectations from the marketing function evolving in the context of nonprofits?

Far beyond storytelling and brand awareness, marketing is now a function navigating complex challenges - political headwinds, fundraising fatigue, and public skepticism. Post-pandemic realities and global instability have made donors more selective, while younger stakeholders demand local, tangible impact. In a fragmented media landscape, trust is harder to earn. Nonprofit marketing must now be more responsive, localized, and insight-driven, without losing sight of a unified global mission.

Q: How are you using technology – especially Gen AI and agentic AI – to drive stakeholder engagement and/or improve marketing outcomes?

Like many global organizations, we're balancing innovation with governance, but adoption is outpacing policy. The real unlock isn't just tools - it's culture, enablement, and trust. AI has become a creative collaborator, and marketing is one of the "early adopters" in translating AI's potential into business value. Success depends on empowering teams to experiment and use the full AI stack, with marketing now accountable for measurable financial outcomes.

Q: How can nonprofits stand out in terms of marketing?

Nonprofits need to align with the evolving needs, motivations, and media habits of their audiences. In today's environment, it's not enough to push out purpose-driven messaging. People want to feel seen, heard, and engaged, on their terms.

With declining faith in institutions – media, government, even business – consumers are turning to individuals they trust. That's why influencer marketing, especially partnerships with mid-tier creators, is proving more effective than traditional campaigns.

For nonprofits, the key is enabling real, human storytelling - from CEOs to frontline staff, and amplifying voices that already hold public trust. That shift in mindset is what will unlock deeper, more lasting connections.

In today's environment, it's not enough to push out purpose-driven messaging. People want to feel seen, heard, and engaged, on their terms.

04 Recommendations: Reclaim your marketing to build competitive edge

In the section below, we share detailed recommendations on how marketing can reclaim its role as the owner of customer experience and orchestrator of future growth, and how it can leverage martech as a strategic value driver.

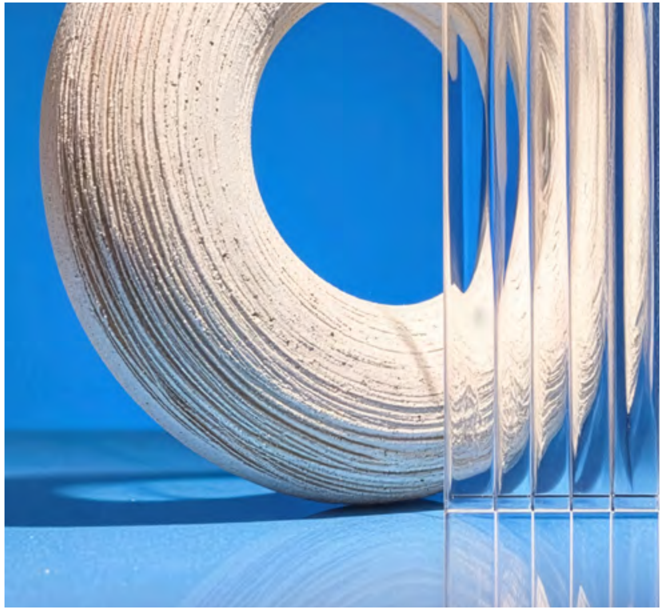


Figure 15.
Strategic recommendations for CMOs to reclaim marketing

*Capgemini Resonance AI Framework

Source: Capgemini Research Institute analysis.

(1) Build a future-fit marketing organization

The first step in this journey is building an organization that wields influence, maximizes efficiency, and promotes AI-driven growth. By conducting a rigorous audit of current capabilities and redesigning the operating model around these principles, CMOs can unlock scalable impact.

Get under the hood of your marketing function

CMOs must conduct a structured audit of current capabilities, identify value drivers and drainers, map capability gaps, and uncover hidden inefficiencies. While 66% of marketing leaders are already restructuring their operating models to improve efficiency, successful transformations begin with a clear understanding of what's working and what's not. This foundational assessment enables more targeted decisions around insourcing versus outsourcing, agency rationalization, centralization, and talent deployment, ensuring that transformation efforts are both realistic and directed toward the greatest available opportunities.

Redesign the operating model

Once marketing leaders have taken stock, the next step is to act. This implies making strategic changes across key marketing levers, such as agency rationalization, centralization, and strategic partnerships.

- **Streamline processes and eliminate duplication:** Organizations should implement AI-native ways of working with clearly defined roles and responsibilities. This includes:
  - Using AI and automation for repetitive tasks, such as content tagging, segmentation, and reporting; freeing up time to focus on strategic, high-impact initiatives.
  - Standardizing processes across markets and product lines to enhance consistency, reducing operational costs, and enabling faster go-to-market.
  - Establishing clear decision rights and accountability frameworks to prevent siloed automation or duplicate investments.
  - Building next-generation marketing capabilities by prioritizing value-added tools and techniques, and targeted upskilling aligned with future business needs.
- **Assess insourcing versus outsourcing opportunities and agency engagement:** Organizations must reassess their approach to partner and agency engagement, strategically determine what to in-source versus outsource, and clearly identify activities that either drive value or drain resources. According to our survey, about two in five (44%) marketing leaders are optimizing agency spend. Jolanda Bakker, Director of Marketing and Sales at Vattenfall, says, *"What's really relevant for us now is understanding the capabilities of the people we have in the team, the capabilities we need in the future, what can be outsourced, what we specifically want to own, and the role of agencies."*

  By introducing specialized agencies, fostering cross-agency collaboration, or closely tying agencies into brand strategy, organizations can benefit from more differentiated ideas and accelerated time to market. PepsiCo has recently added its in-house brand building and strategic capabilities to VaynerMedia's social media expertise, to boost cultural relevance. Matt Watson, the Executive Creative Director for Europe at PepsiCo's in-house agency, Sips & Bites, comments: *"Cost saving is not an input for why we in-house as a business. It's about bringing creativity to the heart of the business."*[39]
- **Centralize operations into regional hubs/global capability centers (GCCs):** This consolidation not only reduces duplication and costs, but also enables standardization, and fosters cross-functional collaboration

44%

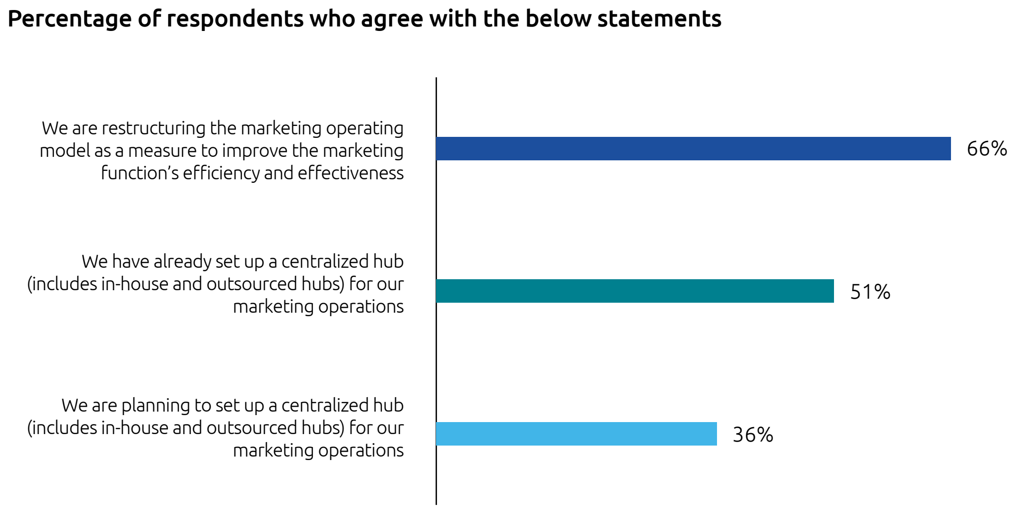
of marketing leaders are optimizing agency spend and knowledge-sharing. Heather Hartridge, Director of Global Marketing Excellence and Innovation at Twinings, says: *"As a consumer-centric business, our model is locally led. However, there are increasing opportunities for our cross-market teams to partner and learn together – on innovation, CX, and technology – and we actively facilitate this."* Our survey reveals that 51% of organizations have already set up a centralized hub (including in-house and outsourced hubs), while 36% are planning to do so in the next two to three years. Inter IKEA Group brought together its global marketing and communication competencies and assignments into a new entity called IKEA Marketing & Communication AB (IMC), with the ambition of strengthening its global presence and market leadership.[40]

36%

are planning to set centralized hubs for marketing operations in the next two to three years.

Figure 16.

Organizations are restructuring their marketing operating model and have set up/plan to set up centralized hubs



Source: Capgemini Research Institute, CMO Playbook #3 research, June–July 2025, N = 1,500 organizations.

As a consumer-centric business, our model is locally led. However, there are increasing opportunities for our cross-market teams to partner and learn together – on innovation, CX, and technology – and we actively facilitate this.

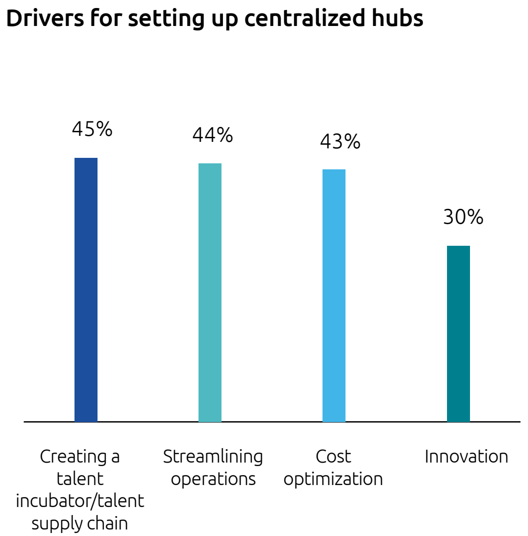
Heather Hartridge
Director of Global Marketing Excellence and Innovation at Twinings

Top drivers for setting up a centralized marketing hub are creating a talent incubator/talent supply chain (45%) and streamlining operations (44%), while fewer organizations are considering it for boosting innovation.

45%

of marketing leaders consider creating a talent incubator/ talent supply chain as one of the top drivers for setting up a centralized marketing hub

Figure 17.
Top drivers for setting up centralized hubs



Source: Capgemini Research Institute, CMO Playbook #3 research, June–July 2025, N = 1,300 executives with marketing responsibilities from unique organizations.

Going forward, as AI tools become more embedded into marketing workflows, the traditional GCCs will see greater integration of AI into their operations. These 'AI hubs' not only enable greater efficiency by automating admin-heavy tasks but also create smarter, faster decision-making environments where data flows seamlessly, insights are generated in real time, and execution is automated across channels.

This shift marks a transition from labor arbitrage, where cost savings are achieved by relocating tasks to lower-cost geographies, to tech arbitrage, where efficiency and scale are unlocked through automation, AI, and platformization. Marketing-as-a-service platforms are emerging as strategic enablers.

Marieke Rentmeester, Global Marketing Director for the Horeca (hotels, restaurants, and catering) channel at FrieslandCampina, says: *"Centralizing capabilities definitely brings in consistency and control – but true effectiveness comes from balancing global alignment with local relevance.*

For instance, an organization might adopt a 70% global approach and tailor the remaining 30% locally. What makes this powerful is when the global team itself is fully involved in these local adaptations, especially in critical areas like communication. Where each team values each others knowledge to improve and make things better."

- **Strategic and outcome-based partnerships:** Organizations should establish outcome-based partnerships to drive performance and accountability. As demonstrated by the MIT study,[41] external partnerships with customized vendors have been twice as successful as internal builds in scaling pilots.

Reinvesting for growth

Efficiency today is a strategic lever for unlocking agility and impact, as well as freeing capacity for high-value-adding tasks and reinvesting resources for long-term value. Organizations must strategically identify areas where marketers should use their freed-up capacity and bandwidth, as well as areas for reinvesting efficiency gains.

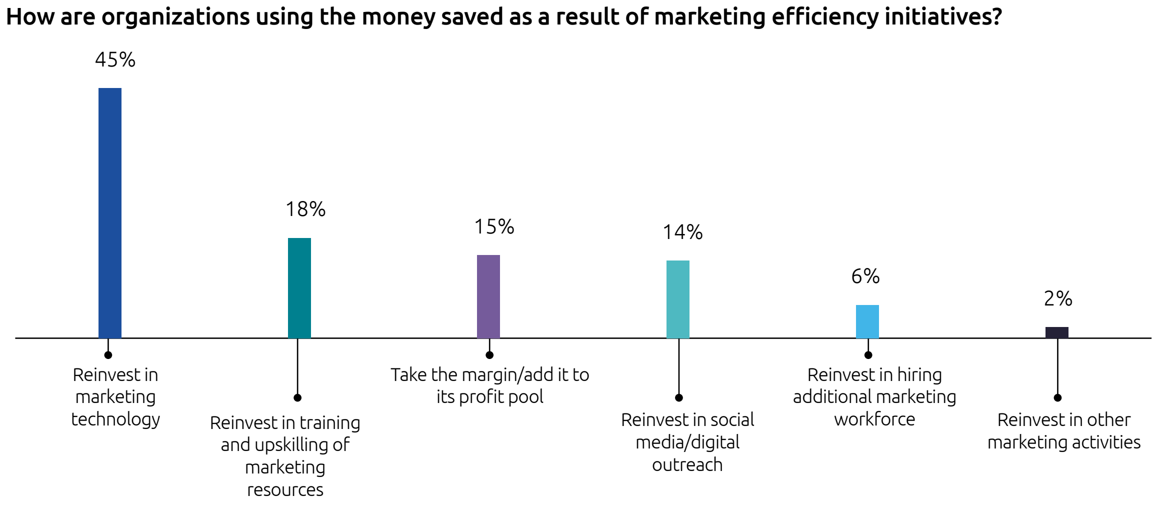
Twinings' Heather Hartridge says: *"Our continuous focus is increasing value and return from our investment, driving growth by sharpening the efficiency of both our spending and how we use our resources."*

Our survey shows that marketing technology is the number one area for reinvestment. This area has the greatest scope for delivering strategic differentiation, with 45% of respondents redirecting efficiency savings toward it, creating a virtuous cycle of efficiency and productivity gains. CMO at a leading European retail chain with a global footprint, highlights the significance of martech investments: *"Brands are challenged to do more with less, making automation and marketing technology investments critical to reaching more customers with limited budgets."*

Marketing technology is the number one area for reinvestment.

Figure 18.

Marketing technology is the top reinvestment area from efficiency initiatives



Source: Capgemini Research Institute, CMO Playbook #3 research, June–July 2025, N = 1,500 organizations.

Develop strong martech foundations

To build a truly future-fit marketing organization, CMOs must develop strong martech foundations. This means establishing a unified martech architecture that integrates data, content, and campaign workflows across platforms, while ensuring governance and compliance. Organizations should also invest in enablement functions to drive adoption and align martech investments with business outcomes. With 45% of marketing leaders reinvesting efficiency gains into martech, it is clear that technology is not just a support function, but a strategic lever for differentiation, productivity, and growth.

Tighten collaboration between CIO and CMO

When CIOs and CMOs work together, they can align technology infrastructure with marketing objectives, break down silos, and create unified processes that prevent fragmented AI adoption. Claudia Willvonseder from Dr. Oetker speaks about the relevance of this collaboration: *"Each function at Dr. Oetker, including marketing, defines its strategy and builds the business case for the required tools, while the selection of tool is aligned cross-functionally with IT to ensure enterprise architecture is harmonized."*

Develop future-ready skillsets and teams

Today's marketers must possess cross-functional skills with fluency across business, technology, and marketing. They should be proficient in areas such as data analytics and AI,

"An organization can save millions by insourcing and taking on the work themselves. But the real risk lies in the quality of talent. Success depends on the company's ability to onboard and build the right skills."

Peter Markey
ex-CMO at Boots

customer journey mapping, agile methodologies, financial acumen, etc.

Peter Markey, ex-CMO at Boots, commenting on the importance of skills and talent, says, *"An organization can save millions by insourcing and taking on the work themselves. But the real risk lies in the quality of talent. Success depends on the company's ability to onboard and build the right skills."*

As marketing evolves from a cost center to a driver of revenue and profit, 68% of respondents in our survey agree that marketers must upskill to add operational skills, including AI ethics, data skills, P&L knowledge, etc.

Structured learning programs should focus not only on technical and operational skills, but also on nurturing human qualities such as creativity, empathy and collaboration, allowing marketers to retain a human outlook in an increasingly digital landscape.

(2) Drive precision and performance:

Having established a future-fit marketing operating model, including efficiency-driven redesign, positioned capability mapping, and strengthened martech, the next phase focuses on enabling impactful engagement at scale and demonstrating value.

This requires advanced attribution models and data-driven targeting to optimize every touchpoint and orchestrate resonant customer journeys that convert. By embedding intelligent measurement frameworks and aligning marketing metrics with business outcomes, marketing can clearly demonstrate its commercial contribution.

The Corporate communications manager for a leading industrial technology company headquartered in the Middle East, says, *"To ensure marketing drives business value, establish a clear performance framework with KPI dashboards, real-time tracking, and ROI metrics that reassure leadership. Use attribution models and aligned scorecards to identify impactful channels and enable agile budget reallocation through quarterly reviews."*

Shift to impactful engagements at scale

Marketers must evolve from static personalization to dynamic, AI-powered engagement strategies that deliver relevance and resonance at scale. This means embracing:

- **Real-time engagement:** Delivering experiences that adapt to customer behavior and context, in real time.
- **Predictive intelligence:** Harnessing data and AI to anticipate customer needs and market shifts and shape interactions.
- **Personalization at scale:** Creating tailored experiences at scale using Gen AI and first-party data.

According to the results of our survey, 71% of marketers use real-time and predictive tooling to optimize CX and deliver impactful outcomes. B2B and B2C organizations differ in their approaches. A greater percentage of B2C organizations (74% versus 57%) are adopting real-time recommendation engines that adapt content and experiences instantly based on user actions and context. The same trend is seen in adopting predictive analytics for personalization initiatives. A greater percentage of B2C than B2B organizations (74% versus 43%) are adopting predictive analytics to forecast customer needs/behaviors and deliver relevant content or offers.

Technologies such as AI, Gen AI, and agentic AI[42] not only drive efficiency by allowing marketing to cut human workloads significantly, but can also automatically extract data for optimized personalization and continuously adapt engagement approach and tactics across channels, at scale.

Virginia Ritchie, CMO at Tommy Hilfiger, says: *"Personalization has evolved beyond simply segmenting and identifying consumer groups. It's now about making the brand feel contextually relevant and emotionally resonant within these different consumer spaces."*

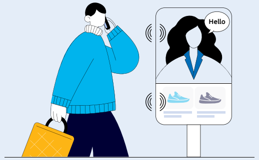
The future of marketing in a Web 4.0 world is marketed by real-time context aware personalization, seamless physical and digital interaction, autonomous and predictive marketing.

Marketing in the Web 4.0 world[43]

Scenario: A customer walking in a smart sports store

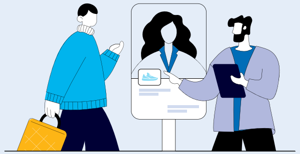
1 Hyper-Personalized, Context-Aware Engagement

A customer enters a smart sports store. Sensors recognize them and sync with their fitness app data. An AI assistant greets them, knows their running habits, and displays personalized shoe recommendations.



2 Human-AI Collaboration

The customer asks a virtual agent for advice on buying shoes for their upcoming marathon; the AI combines their workout history, and reviews to suggest the best running shoe. A store associate joins in for expert tips.



3 Autonomous, Predictive Marketing

After purchase, the AI follows up with tailored offers and unlocks exclusive digital training plans, predicting when the customer might need new gear and proactively engaging them.

4 Seamless Physical-Digital Integration

Human staff and AI work together to deliver seamless, proactive, and highly personalized engagement—blending the in-store and digital experience.

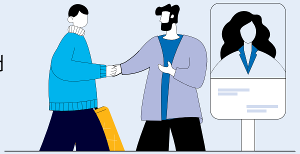
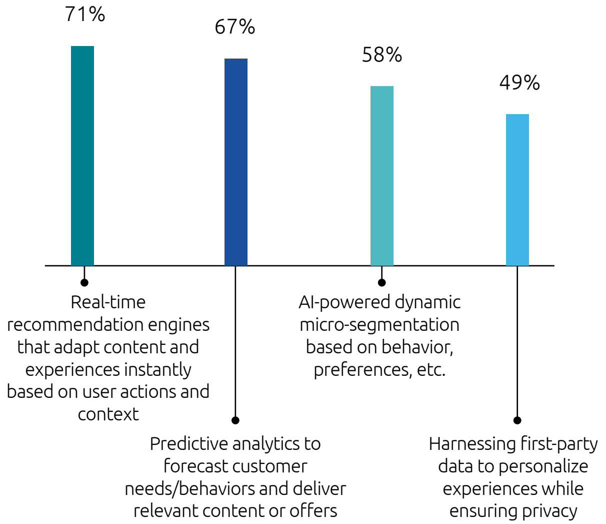


Figure 19.
Organizations are using different approaches to deliver personalized CX

Percentage of organizations adopting the below approaches



Source: Capgemini Research Institute, CMO Playbook #3 research, June–July 2025, N = 1,500 executives with marketing responsibilities from unique organizations.

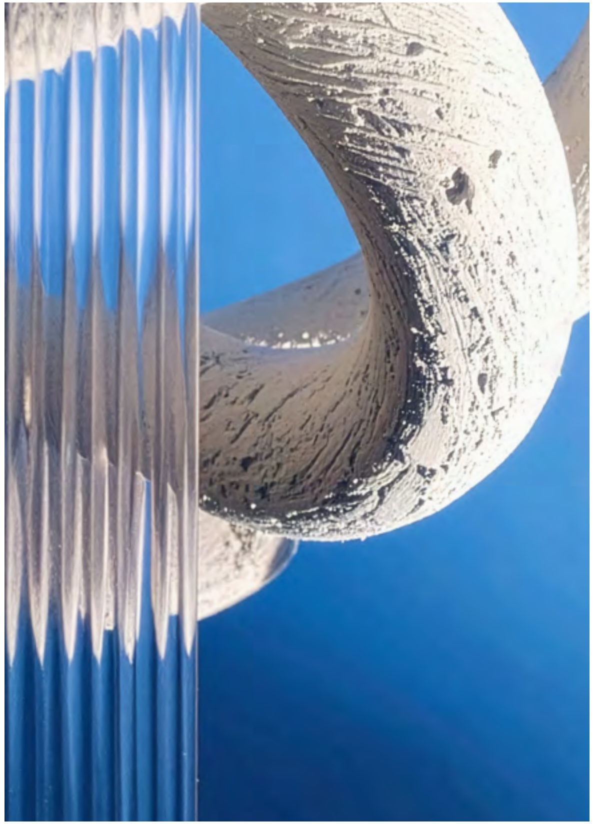
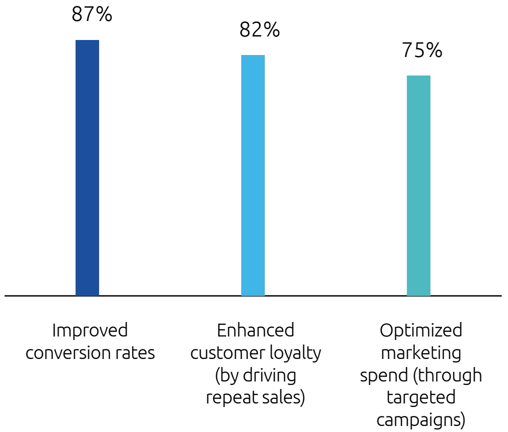


Figure 20.
Organizations acknowledge various benefits from personalized CX

Top benefits seen/expected from personalized CX strategies



Source: Capgemini Research Institute, CMO Playbook #3 research, June–July 2025, N = 1,499 organizations.

Table 2

Examples demonstrating how organizations are going beyond personalization – and reaping the benefits

Company	Approach	Benefits
Sephora	Sephora utilizes agentic AI to provide personalized beauty advice and product recommendations based on behavioral data, transaction history, and its proprietary skin-tone database.	Customers feel they receive a unique service, resulting in: - 3x increase in click-through rates (CTRs) on personalized offers - Higher conversion rates - 11% higher add-to-cart rate post try-on - fewer returns - 30% longer engagement on product pages - 40% reduction in creative production time
Zalando	Zalando employs agentic AI to analyze customer interactions and preferences, enabling tailored fashion recommendations. It also integrates a real-time fashion trend discovery tool that highlights emerging styles across six European fashion capitals, into its discovery platform, enhancing contextual relevance.[44]	The implementation of AI personalization strategies led to a 25% boost in conversion rates and a 17% increase in average order value.
Capital One	Deployed a multi-agentic AI system modeled after the company's own organizational structure, where specialized agents collaborate to handle complex customer interactions autonomously. The system engages users in natural, human-like conversations to answer detailed queries, compare vehicles, and schedule test drives.[45]	Delivered a 55% increase in high-quality leads for dealerships, significantly enhancing customer engagement, operational efficiency, and conversion rates

Company	Approach	Benefits
Starbucks	Starbucks overlays customer data with data on weather, time of year, holidays, etc., providing accurate, personalized food and drink recommendations, specific store promotions, as well as real-time notifications when a customer is near a store or when their favorite drink is available.	The adoption of AI has brought an upsurge of 30% in Starbucks' ROI, and 15% growth in customer engagement levels compared to its previous marketing methods..[46]
Nike	Nike's predictive AI analyzes app usage, purchase history, and social signals to deliver ultra-personalized product recommendations – effectively, a design studio for every user.	Surge in engagement and repeat purchases, with similar predictive personalization models, increasing repeat rates by up to 30%.[47]
The Coca-Cola Company	In partnership with Adobe, offers real-time personalization of CX. Provides one-to-one product recommendations based on behavioral history and shopper affinities using technologies such as AI and machine learning (ML).	Drove a 117% increase in clicks and a 36% increase in revenue. 17% CTR for its 'Frequently Bought Together' cross-sell recommendations. Conversion rate from on-site search hits 19%, with the top three results generally containing what customers were looking for.[48]
Global telecommunication company operating in the US	Using real-time contextual data (such as user's preferred device, access location, peak activity periods, employment industry, etc.) across all touchpoints to provide dynamic experiences at individual level, including personalized digital data plan report, alerts, and billing plans.	Improved CTR for onboarding campaigns by 10% and re-engagement campaigns by 7%. Reduced churn rate by 25%. Used just-in-time (JIT) discounts and offers to increase average revenue per user (ARPU).[49]

Adopt intelligent attribution models
In today's complex, multi-channel landscape, marketers must adopt intelligent attribution models that provide real-time visibility of commercial performance. Traditional attribution methods often fall short in capturing nuanced, cross-channel customer journeys, leading to misaligned investments and missed revenue opportunities.

By using AI-powered tools, marketers can track sales value in real time across channels and touchpoints, uncover missed opportunities by identifying underperforming/overlooked areas, and align marketing efforts with revenue outcomes. Terrence Wiggins, Global Marketing Director at Cook Medical, says: *"There are so many channels to consider: social media, paid advertisements, trade shows, medical conferences, etc. Attribution helps us ensure a good ROI by investing in the right ones where our customers are truly present."*

This requires future-ready frameworks and multi-channel analytics that accurately identify which campaigns, platforms, and interactions are driving conversions. Despite the clear benefits, only one in three respondents currently uses analytics effectively.

Bridge the engagement-to-conversion gap by breaking down sales-marketing silos
CMOs must integrate sales and marketing go-to-market strategies to unlock capacity, improve alignment, and drive higher returns. Only 23% agree that their sales and marketing functions have common KPIs and shared targets, meaning many could suffer from misaligned priorities, fragmented execution, and suboptimal CX. Marketing leaders recognize the importance of this alignment and enhancing marketing and sales collaboration (e.g., for effective lead generation and conversion) is a top priority for 61%.

Link marketing metrics to business outcomes
To secure sustained investment and influence, marketing must demonstrate its contribution to business outcomes. This begins with establishing measurement methodologies that connect marketing KPIs to overarching business goals.

David Hirsch, General Manager of Marketing & Customer Insights at QBE Insurance, underscores this point: *"During business downturns, the value of marketing is often questioned. But if marketing is visibly driving growth, then investing in marketing becomes a strategic commercial decision – not a debate about its relevance."*

> **Organizations must develop executive-level dashboards that link marketing activities to tangible outcomes.**

Organizations must develop executive-level dashboards that link marketing activities to tangible outcomes. While performance marketing metrics such as conversion rates and cost per acquisition are easier to quantify, branding outcomes require a different lens and should not be evaluated solely through short-term ROI.

A balanced measurement framework that includes both short- and long-term indicators (e.g., customer loyalty, brand equity, and engagement across the customer journey) is essential to reinforce marketing's strategic value. Todd Taylor, CMO at Capgemini Invent, adds: *"Marketing must relearn how to drive performance, grow brands and create relationship value across channels and throughout the customer journey. Embracing that transformation is now at the very heart of the CMO role."*

(3) Integrate AI end-to-end for impact

Organizations must focus on the transformative potential of Gen AI and agentic AI to create entirely new, native use cases in marketing and branding, in addition to just improving operational efficiency or automating existing processes and targeting incremental improvements.

AI implementations should evolve toward enterprise-wide orchestration – embedding AI into data, infrastructure, governance, and human-AI collaboration – to drive scalable, intelligent, and sustained impact.

There are so many channels to consider: social media, paid advertisements, trade shows, medical conferences, etc. Attribution helps us ensure a good ROI by investing in the right ones where our customers are truly present."

Terrence Wiggins
Global Marketing Director at Cook Medical

François Renard, ex-global CMO at Renault, says: *"Many companies use AI as a patch for productivity, rather than fundamentally reinventing their organizations to be AI-native, limiting the impact to incremental gains, rather than exponential transformation."*

AI transformation must begin with a cohesive plan for Gen AI and agentic AI adoption. Gartner states that nearly 60% of high-maturity organizations have centralized their AI strategy, governance, data, and infrastructure capabilities to increase consistency and efficiency, while 63% have implemented metrics.[50]

Recently, Nokia overhauled its organizational structure to sharpen its focus on AI. *"To succeed in the AI supercycle, we need to focus on where we can drive differentiation through our core technologies, strengthen our capabilities in security and AI, and maximize the value of partnerships in our ecosystem. Having a dedicated technology and AI organization will be an important asset for us and our customers,"* said Nokia's President and CEO, Justin Hotard.[51]

The framework below serves as a guide for leaders embarking on their AI transformation journeys.[52]

AI essentials: Data, infrastructure, LLMs
Organizations must establish 'Intelligence-as-a-Service' and invest in raw data assets, scalable infrastructure, advanced language models, and software with built-in AI capabilities, to support seamless integration of AI across end-to-end workflows.

This includes deploying a martech stack capable of supporting real-time data ingestion, automated decision making, predictive analytics, dynamic content delivery, contextual engagement, and automated campaigns.

Today, six in 10 organizations (64%) are undertaking technology harmonization initiatives such as modernization and consolidation of the existing technology stack, as well as implementing new tools and technologies that add business value.

For example, Hellmann Worldwide Logistics modernized its CRM system, including account management and lead management, to generate better visibility and insights. This resulted in an expected 20% improvement in lead generation and opportunity conversion and 10% churn reduction.[53]

IBM consolidating over 40 disparate marketing solutions into five. This not only simplified IBM's tech stack but also led to a cost reduction of $120 million.[54] Similarly, Lenovo unified three separate martech point solutions into a single integrated platform, resulting in annual savings of $11 million. This consolidation also boosted content output by 53% and improved CTR by 12.5%.[55]

The other critical component is data. Peter Burns, Director of Marketing and Digital at Heathrow airport, states: *"In many organizations, data remains siloed, and while investments in technology such as data lakes are common, the real value comes from having a clear data strategy, governance, and the ability to activate insights across the business."*

CMOs should implement data management platforms and techniques to improve data quality and create efficiencies in data access and usage. One in three (33%) organizations is implementing a customer data platform (CDP) that integrates data from multiple sources to create a unified view of each customer.

The third key component is the deployment of LLMs that can process unstructured data such as customer feedback, social media, etc., to surface insights and drive contextual engagement. When integrated into the martech stack, LLMs can automate campaign planning, personalize content across channels, and simulate customer journeys to test messaging effectiveness.

33%

of organizations are implementing a customer data platform (CDP) that integrates data from multiple sources to create a unified view of each customer.

"In many organizations, data remains siloed, and while investments in technology such as data lakes are common, the real value comes from having a clear data strategy, governance, and the ability to activate insights across the business."

Peter Burns
Director of Marketing and Digital at
Heathrow airport

AI readiness: Guardrails, governance, and operating model

Success with AI hinges on scaling effectively while adhering to ethical, privacy, and security-related guardrails. With 82% of marketers citing data privacy as a top concern, governance structures must enforce regulatory compliance and promote customer-centric data practices. CMOs can ensure compliance and stronger governance by:

- **Conducting regular audits** to ensure data handling practices align with current regulations. Working closely with legal, IT, and compliance teams can help marketing teams to stay ahead of regulatory changes.
  Alberto Hernández, CGO at Opella, says the organization operates an AI "factory" that produces advance care planning materials for medical professionals. It embeds at least one human regulatory adviser within its AI marketing team to catch and address hallucinations. Opella incorporates insights from healthcare professionals into the training of its AI agents.
  Ian McGregor from Green Man Gaming says, *"Customers increasingly value authenticity, especially the younger generation who consume media with a sharp eye. They can easily spot what's not genuine, and I believe authenticity will only grow in importance in the future."*
- **Embracing privacy-first marketing** by relying more on data collected directly from customers (e.g., via website interactions, surveys, loyalty programs), rather than third-party sources, and adopting principles such as data minimization. Simultaneously, organizations need to invest in consent management platforms (CMPs) to ensure compliance with regulations such as the General Data Protection Regulation (GDPR).
- **Investing in ethical tech** and implementing privacy-enhancing methodologies such as differential privacy, anonymization, and secure multi-party computation. These can help protect user data, while still enabling insights.

Human-AI chemistry: Hybrid teams, human touch, and upskilling

The quality of collaboration between humans and AI determines depth of AI integration. CMOs can shape human-AI chemistry by:

- **Clarifying roles for smooth human–AI collaboration:** Human connection remains central to marketing and tech strategy. Automation must not take precedence over emotional resonance. Emphasizing the enduring importance of emotional connections Jessica Padula from Nestlé Nespresso says: *"Brands will continue to play a meaningful role. Marketing's future increasingly relies on balancing emotional connections with consumers and data-driven, business-focused strategies."*
- **Ensuring brands do not fall into the AI 'sameness trap:'** With everyone engaging in AI-driven personalization, human creativity and ingenuity must be preserved as an input. Márcio Carvalho, CMO at Claro Brazil, states: *"AI is doing amazing things and transforming the way we work and connect, but we must never lose sight of the human touch. Creativity, empathy, values, and ethics are what make brands and businesses meaningful—and those must always be guided by people. Without human care and responsibility, we risk not only brand reputation but also the trust and emotional connection we've built with our human customers."*
- **Upskilling teams for AI usage and continuous improvement:** Organizations must upskill its marketers through tailored AI literacy programs that focus on prompt engineering, model evaluation, adaptive mindsets, and ethical use. Nicola Scirocco, former CMO of North Europe Region, PRYSMIAN says: *"There is a need to continuously update new skills and competencies in marketing, particularly around AI, to be competitive in the market."*

82%

of marketers cite data privacy as a top concern.

Excerpts from interview with

Claire-Louise Green,

VP EMEA Enterprise Marketing at Adobe

Q: With increasing pressure to deliver more with less, how are marketing leaders adapting their strategies?

We're all feeling the pressure to do more with less – but the solution isn't simply tightening our belts, it's reimagining how we capture and keep attention in an increasingly noisy world. Capturing attention requires content that is not only personalised, but contextually relevant in the moment. AI is transforming how marketing leaders adapt: moving from broad segmentation to true one-to-one engagement at scale.

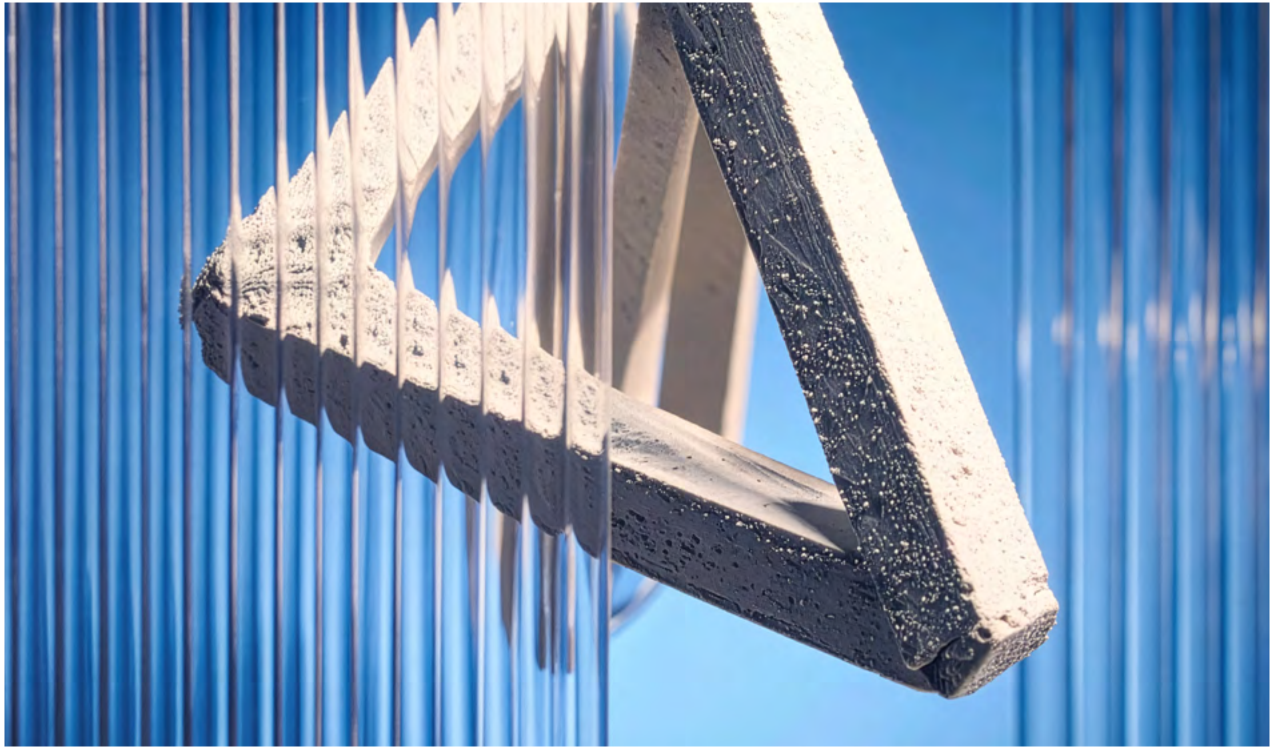
Q: How can organizations adopt and benefit from generative AI and agentic AI in marketing?

At Adobe, we're helping brands harness generative and agentic AI to not just create more content, but capture and keep attention where every interaction matters. By automating repetitive tasks and surfacing deeper insights, these technologies remove friction from workflows and free teams to focus on storytelling and innovation. Tools like Adobe GenStudio and Firefly enable marketers to deliver in days what once took weeks. Success depends on thoughtful implementation and delivering quick, tangible value to the teams using it.

Q: How does the future of marketing look like?

The future of marketing will be defined by those that most effectively bring together creativity, marketing, and AI to deliver personal, seamless experiences. Brands will compete not on product or price, but on the orchestration of consistent customer experiences. To thrive, companies must embrace AI as a creative and productivity partner, understand their customers deeply, and break down silos. Efficiency and scale are key—but creativity and purpose must lead.

The future of marketing will be defined by those that most effectively bring together creativity, marketing, and AI to deliver personal, seamless experiences



- **Catering to the AI-influenced consumer:** Today, 58% consumers have replaced traditional search engines with Gen AI tools[56]. With digital assistants and AI agents increasingly shaping purchase decisions, organizations must prepare to win the AI-influenced customer. While 64% of organizations recognize the need to optimize content for user intent and contextual relevance, only 40% are actively investing in generative engine optimization (GEO) – a key capability for appealing to AI agents that guide consumer choices.
- **Leading with customer-centricity and trust:** Build all marketing efforts around the customer by demonstrating genuine understanding. For example, Prudential uses AI to guide customers to overlooked benefits based on their policy history.[57] Showing that you understand the customer's specific needs and context, and are truly invested in finding relevant solutions, builds lasting trust.

40%

are actively investing in generative engine optimization (GEO) – a key capability for appealing to AI agents that guide consumer choices.

Conclusion

For marketing leaders, this is a pivotal moment. While AI and martech promise transformative growth, most organizations are still struggling to realize their full potential. The principal barriers are fragmented ownership, skill gaps, and operational inefficiencies. CMOs must move beyond short-term fixes and reclaim marketing to build competitive edge - by shifting from complexity to clarity. This means embracing a future-fit operating model that integrates AI end-to-end, streamlines processes and agency relationships, and upskills teams for agility and innovation.

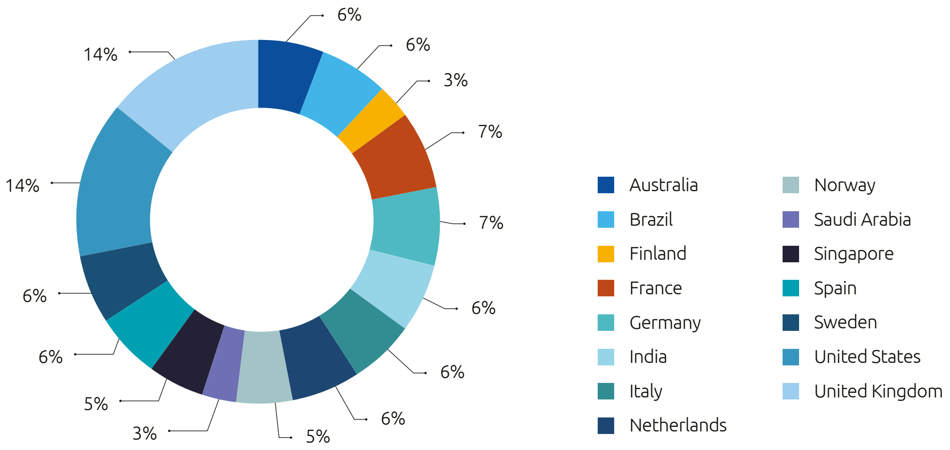
Success requires foundational readiness on data, technology, operating models, and processes, as well as stronger collaboration between marketing, IT, and business functions. Clear governance and an unbroken focus on measurable outcomes, especially engagement that converts and drives ROI, are essential. By following this template, marketing leaders can overcome fragmented processes, reconnect with their core purpose, and reassert their strategic influence. Ultimately, the journey forward must be structured and technology-enabled, yet always guided by human touch.

Research methodology

This research is the third in the CMO playbook series. We conducted an extensive survey in July 2025, engaging 1,500 executives at director level and above, overseeing marketing strategies within diverse organizations across 15 countries worldwide. These organizations each have annual revenues of $1 billion and over. To complement this research, we interviewed nearly 30 CMOs and marketing leaders.

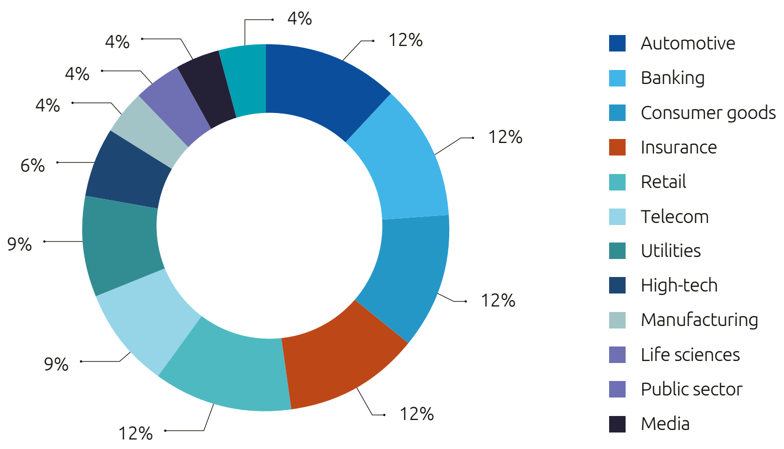
The study findings reflect the views of the respondents to our online questionnaire for this research and are aimed at providing directional guidance. Please contact one of the Capgemini experts listed at the end of the report to discuss specific implications.

Percentage of organizations by headquarter's location



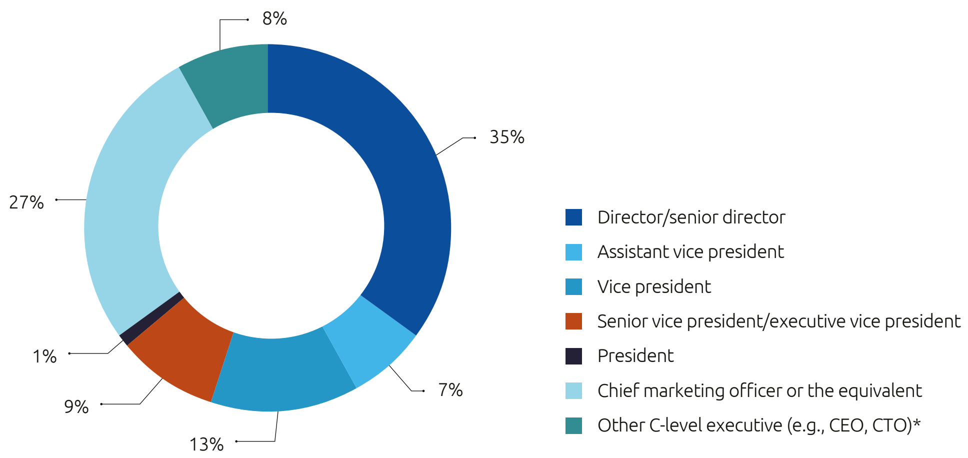
Source: Capgemini Research Institute, CMO Playbook #3 research, June–July 2025, N = 1,500 organizations

Percentage of organizations by industry



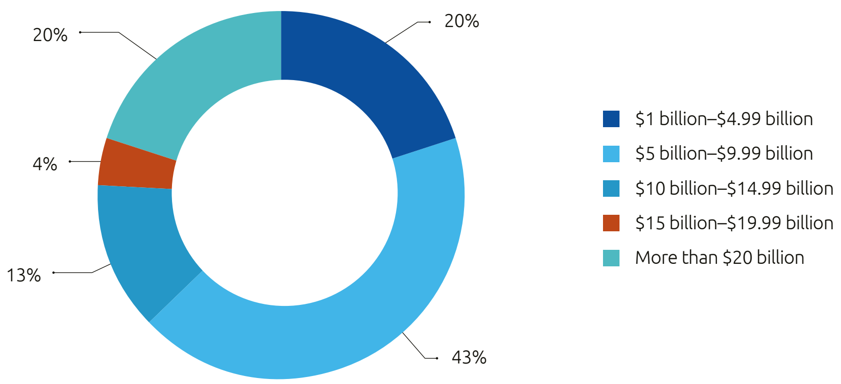
Source: Capgemini Research Institute, CMO Playbook #3 research, June–July 2025, N = 1,500 organizations

Percentage of respondents by title

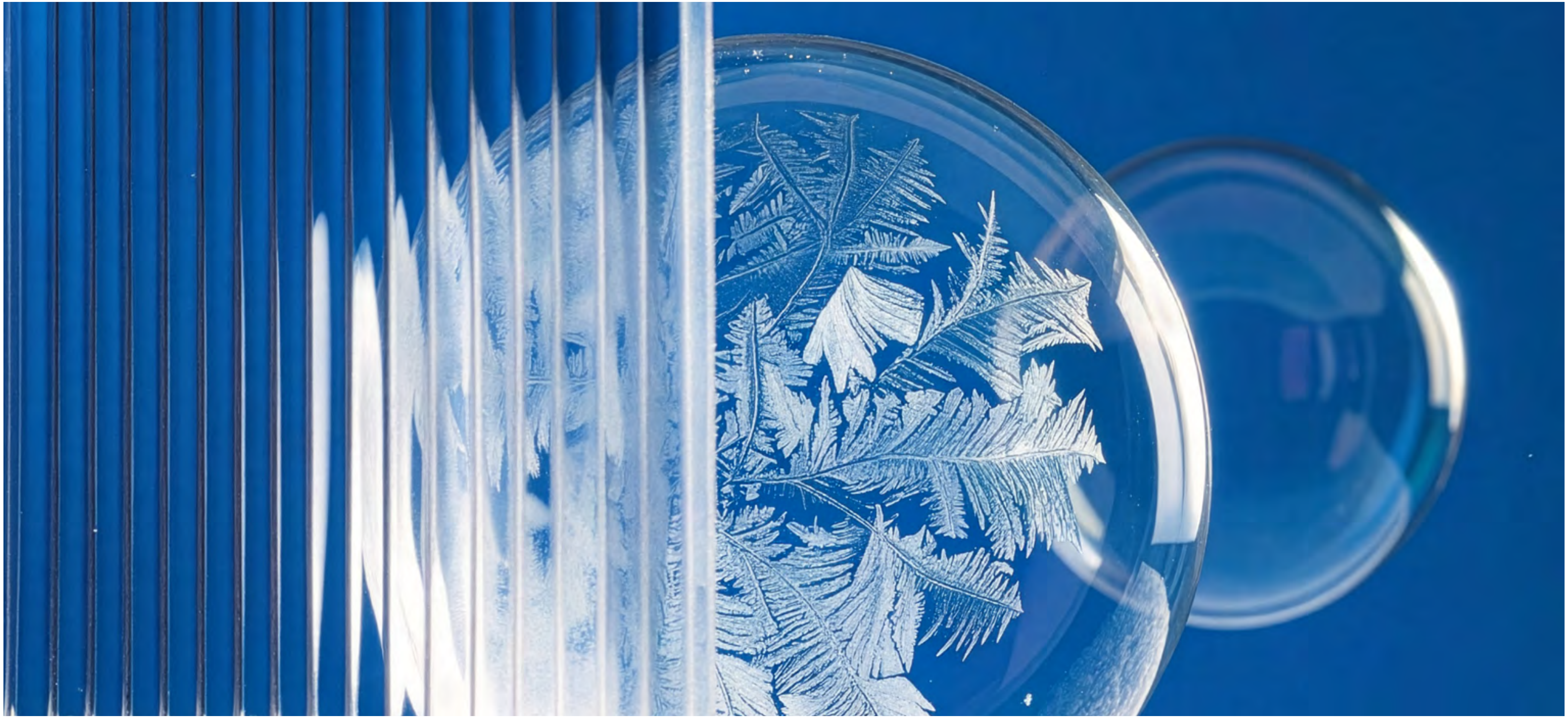


Source: Capgemini Research Institute, CMO Playbook #3 research, June–July 2025, N = 1,500 organizations
* having involvement in the marketing function

Percentage of organizations by annual revenue



Source: Capgemini Research Institute, CMO Playbook #3 research, June–July 2025, N = 1,500 organizations



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About frog

frog is a leading global creative consultancy, part of Capgemini Invent.

We challenge the status quo to craft and build transformative human experiences that win hearts and move markets.

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About the Capgemini Research Institute

The Capgemini Research Institute is Capgemini's in-house think tank on all things digital. The Institute publishes research on the impact of digital technologies on large traditional businesses. The team draws on the worldwide network of Capgemini experts and works closely with academic and technology partners. The Institute has dedicated research centers in India, Singapore, the United Kingdom, and the United States. The Institute was ranked #1 in the world for the quality of its research by independent analysts for six consecutive times - an industry first.

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Our Solutions

In this new era of marketing, the goal is to transform marketing into an AI-native organization, positioning it as the ultimate growth and value driver within the enterprise. Our marketing solutions and offers are designed to accelerate this transformation and deliver tangible results swiftly ensuring that marketing regains its influence and strategic impact.

Underpinning our offers is our flexible engagement model that meets clients where they are on their AI Marketing transformation journey. Built on three strategic layers—strategy, execution, and operations—it enables end-to-end impact. We define a clear, actionable AI vision and roadmap aligned with business ambition; activate that vision by modernizing and optimizing platforms, content, and operations through the power of AI, data, and technology; and scale capabilities through global operations and as-a-service delivery for continuous optimization, governance, and measurable outcomes. This adaptable model empowers CMOs to evolve their operating model, maximize martech investments, and achieve sustainable efficiency and performance across the marketing organization.

Challenge:
AI is not delivering its potential

Our Solution:

We have rethought marketing with an AI native vision, blueprint and accelerators designed to help you unlock the full potential of your AI strategy.

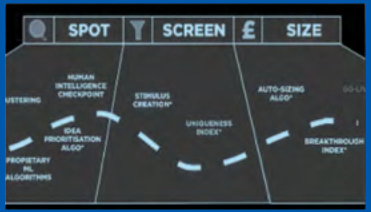
- **AI strategy & investment:** Our solution provides a comprehensive framework for defining your AI strategy and building a strong business case for investment. It includes unique global assets for real-time content generation, predictive analytics, and automated campaign activation. Embracing privacy-first marketing by relying more on data collected directly from customers (e.g., via website
- **Partners & Dependencies:** AI for enterprise assets & frameworks, ensuring the right balance of human and AI capabilities, seamless workflows and clear dependencies for E2E AI efficiency
- **Operational Integration & Compliance:** Unique assets covering AI essentials, operational readiness and human adoption to ensure seamless integration of AI across E2E workflows. As well as AI concept validation tooling, providing the ability to test AI concepts and ensure compliance.

AI Marketing Accelerators and offers

AI Strategy Methodology

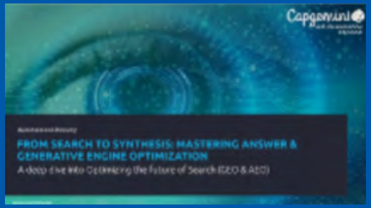
A Future-fit Agentic AI strategy, insights & business case

AI Concept Validation



Test AI concepts to ensure value realization & compliance

Generative Engine Optimization (GEO)



Synthetic personas to optimize authentic audience and muscles

Resonance AI Framework

Embed AI into the core organization for unprecedented value unlock

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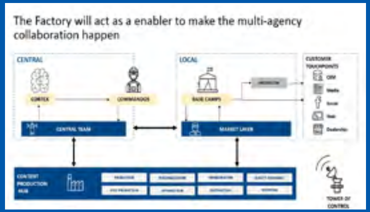
Challenge:
AI is not delivering its potential

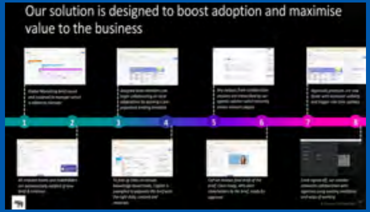
AI Marketing Accelerators and offers

AI- Powered Content Orchestration



Hyper automation of content processes including personalization at scale

Smart Briefing



AI automation of marketing processes, including briefing and market needs

AI-Powered Customer Activation and Marketing Journeys

Hyper-personalization and contextualization to enable outcome driven marketing journeys and activation

AI-Powered Marketing Operations

Outsource marketing capabilities with our global and AI powered operations to enable scale

Challenge: Martech ownership and influence is blurring

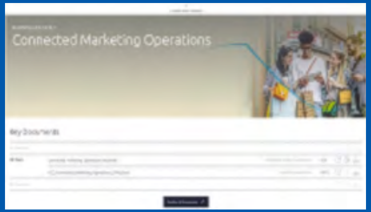
Our Solution:

We partner with CMOs and CIOs alike, providing us the unique perspective to shape and implement unified vision, architecture, and MarTech foundation required to power an AI-native marketing organization with an effective marketing backbone.

- **Diagnose & audit:** Understand what is holding CMOs and CIOs back from extracting value from their martech
- **Solution, design and mobilize:** Create the compelling case for change, roadmap and buy-in
- **Rapid time to value:** Implement high impact changes across people, technology and process, and organization
- **Enable, continuous improvements & operations:** Modernize platforms at pace with market changes and business demands, enable internal capabilities and outsourced managed services that flex with business cycles and demand

Future-Fit Marketing Accelerators and offers

Connected Marketing Engine



An Adobe AI ready marketing platform blueprint & accelerator to enable end-to-end marketing operations

AI Campaign Builder

Accelerate AI campaigns with smarter demos

Raise AI Platform / Agentic Workbench

Develop AI platforms for marketing automation through agentic workflows

AI & Martech Readiness Assessment

Rapidly assess where & how to get started in AI for marketing

Challenge:
CMOs are constrained by ineffectiveness

Our Solution:

- **Operating model re-design & efficiency:** Unique assets from global op model re-design, ensuring future-fit workflows and talent models, by conducting an insourcing/outsourcing assessment and partnering constructs e.g., risk/reward share on business outcomes
- **Future-fit skillsets & teams:** We evaluate roles through detailed interviews, run AI learning academies and develop 40+ training modules to upskill teams for future marketing needs
- **Streamline and remove duplication:** Unique assets from efficiency enhanced, AI Native DILOs with clearly defined roles to cost-out frameworks
- **High value, focused marketing:** 2030 ASE Future-Driven Marketing upskilling, focused on delivering next-gen, value-added tools & techniques and addressing cost-out measures

Future-Fit Marketing Accelerators and offers

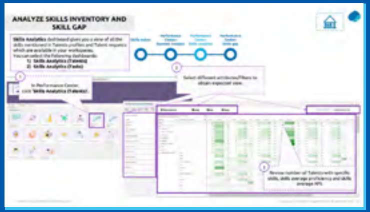
OP Model Framework

A 12-week approach to designing op-model efficiency

Industry Benchmarks

Deconstructed roles and responsibilities in marketing

Skills Gap Assessment



Conduct thorough review of skills, capabilities and gaps

Personas & DILOs Studies

Understand roles, responsibilities & opportunities for capacity unlock

to be cont.

Challenge:
CMOs are constrained by ineffectiveness

Future-Fit Marketing Accelerators and offers

Marketing 2030 Showcase

Inspirational showcase event to help CMOs see the future marketing operation

Future Talent Model

Insourcing/outsourcing assessment & partner constructs (e.g. risk/reward share)

Challenge:
The key to unlocking growth is engagement that converts

Our Solution:

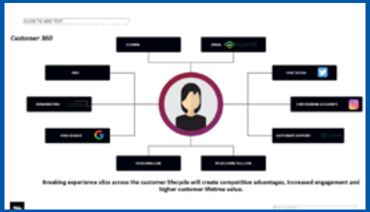
Business Case & ROI: Measurement methodologies to ensure marketing KPIs are linked to key business outcomes. As well as performance marketing dashboards & measurement masterclasses to prove the value of marketing efforts and secure investment

- **Real-Time Visibility:** AI-powered, sales engine tools to capture sales value in real time & identify missed opportunities
- **Measurement & Attribution:** Future-ready attribution frameworks that intelligently identify and track the channels, touchpoints and campaigns which contribute most to conversion

- **Engagement vs Conversion Gap:** Unique engage-to-convert frameworks, focusing on the integration of Sales and Marketing GTM to unlock capacity and generate higher returns

Marketing Precision Accelerators

Consumer 360

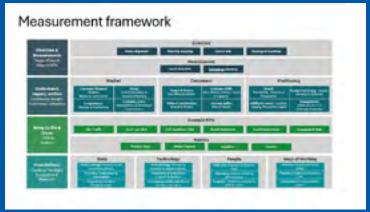


Consumer data, CDP and profiling

Dynamic Segmentation

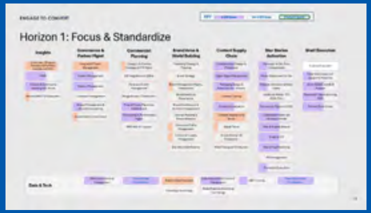
Smarter segmentation for targeted marketing

Measurement Frameworks



Measurement methodology to track performance

Engage-to-Convert



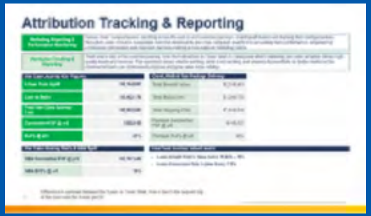
Unify sales & marketing to generate higher returns

to be cont.

Challenge:
The key to unlocking growth is engagement that converts

Marketing Precision Accelerators

Attribution Framework



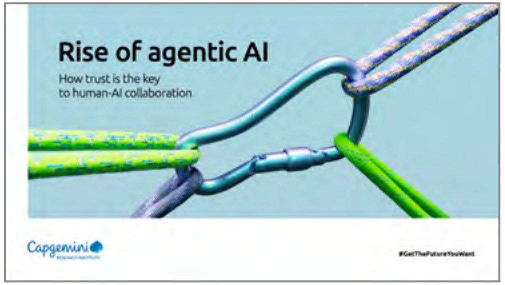
Identify which work contributes most to conversion

AI-Powered Sales Engine

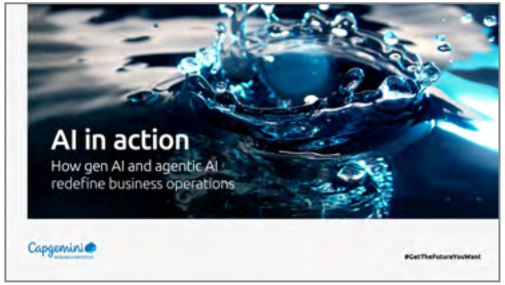
Capture sales value and identify missed opportunities

More Capgemini Research Institute publications

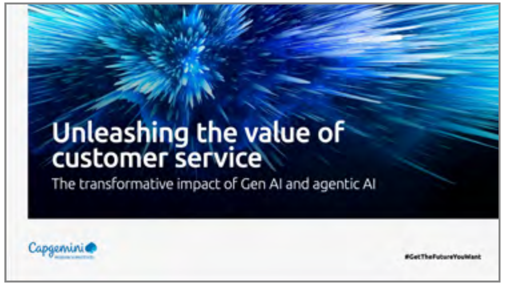
Harnessing the value of AI



Rise of agentic AI



AI in action



Unleashing the value of customer service

CMO Playbook 2

CMO Playbook 1

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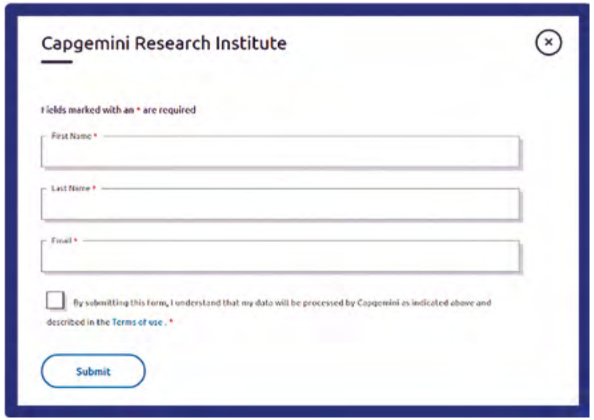
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