



Growth Study: The State of Marketing 2025

 KANTAR

CMOTALK+

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Foreword by Klaas Weima

Founder CMOTalk



Research and insight have been at the heart of CMOTalk since day one. They fuel our conversations, inspire our programmes, and shape the themes we explore through our podcast, the BNR radio show, and the gatherings of our communities. Through these initiatives, we aim to inspire, connect, and challenge marketing leaders to reflect on the future of their profession.

We believe that knowledge and understanding form the foundation of effective leadership. Research is essential to that mission: helping us to make sense of how marketing is evolving, the challenges leaders face, and why growth can no longer be taken for granted in today's world.

Together with Kantar, we set out to explore how CMOs and senior marketers in the Netherlands define and drive growth. What are their priorities? Where do the key challenges lie? And how are they developing their teams and organisations for the future? The result is this State of Marketing report.

What makes this collaboration particularly valuable is the

inclusion of both today's CMOs and the next generation of marketing leaders. This new cohort brings not only a different energy but also fresh perspectives that make the research even richer.

This paper goes beyond identifying who holds responsibility for delivering growth. It takes a deeper look at the strategies, barriers, and frustrations marketing leaders encounter along the way. A significant part of the research also focuses on the application of AI in marketing, asking a crucial question: can successful implementation truly contribute to long-term, sustainable growth?

Throughout the report, we draw gratefully on the insights shared by marketing leaders during a closed discussion group. In addition, more than seventy marketers generously contributed their time and experience to this study for which we are sincerely thankful.

We hope this research helps advance the conversation around marketing's value as a growth

enabler – a conversation that does not end with data and trends, but begin with a more fundamental question: how can we, as marketing leaders, *make a difference*?

Enjoy the read.

Executive Summary

What does growth truly mean for today's marketing organisations? And how confident are CMOs in their ability to deliver it, among shifting expectations, relentless change, and the rise of new technologies?

For this edition, CMOTalk sets out to answer these questions with a fresh perspective, teaming up with Kantar as our Knowledge Partner to conduct an exclusive study on the State of Marketing.

Our ambition: to provide actionable, nuanced insights that help marketing leaders unlock growth in their organisations.

A Collaboration Built on Expertise and Curiosity:

Kantar's Blueprint for Brand Growth is helping us to make sense of this research. The Blueprint represents a breakthrough in understanding

how businesses build strong, profitable brands. It builds on prevailing theories, such as brand penetration and mental/physical availability—but goes further, uncovering the factors that truly drive sustainable growth. It challenges marketers to focus on the deeper levers of value creation: brand meaning, difference, and salience.

A Methodology Designed for Depth and Discovery:

Our research combined quantitative rigour with qualitative depth. We surveyed 64 marketing leaders—including CMOs, heads of marketing, and other key decision makers across a diverse range of industries, company sizes and strategies. This provided a representative snapshot of the current state of marketing leadership. Throughout this paper, you will also see some nuances from different sub-groups: Seniority of respondents, years of experience, but also differences of results between organisations where marketing is perceived as a growth driver or not.

But we didn't stop at the numbers. To capture the real stories,

tensions, and ambitions behind the data, we conducted a series of qualitative deep-dive interviews. These conversations revealed the nuances that surveys alone can't reach: the lived experience of growth, the frustrations and breakthroughs, and the evolving mindset of today's CMOs.

Hopefully, this paper will give you food for thought on how to challenge and drive growth within your organisation, and how to push forward the role of marketing.

To give you some general taste of this paper, we can summarise our key findings into the 5 following topics:

Growth is multi-dimensional:

Revenue, acquisition, and brand equity remain core, but depend on leadership alignment, culture, and balancing short-term wins with long-term vision.

Marketing's strategic place is still in debate:

Too often seen as a communication function, marketing must prove its value as a growth engine. The most

effective CMOs make impact visible, credible, and business-relevant.

Capability & creativity unlock growth:

Strong positioning, deep consumer insight, and internal alignment fuel sustainable growth. Strategic creativity amplifies the growth impact.

Barriers persist, but can be broken:

Silos, misaligned KPIs, and tight budgets slow progress. The best leaders build coalitions early, use data, unlock resources through influence and demonstrate how marketing contributes to the business outcomes.

Innovation needs time and trust:

Big bets are often sacrificed to short-term pressures. Yet small, iterative experiments offer powerful learning and deserve more attention.

AI is an accelerator, not a substitute:

Generative AI is reshaping marketing, but human insight remains irreplaceable. The winners will be those who use AI to enhance (not replace) the creativity and empathy that make brands matter.

CHAPTER 1

Growth through marketing's eyes

What growth means to marketers

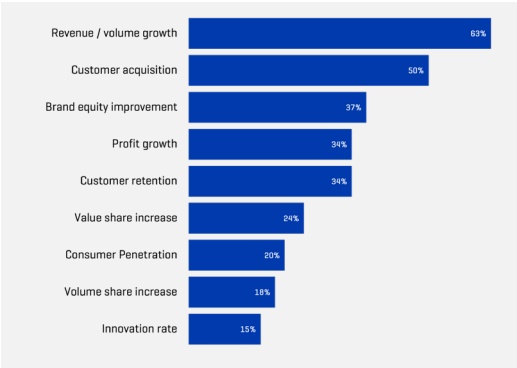
How would you define marketing-driven growth within your own organisation?

Feel free to pause and answer this question for yourself before going further into the findings of our research.

When we asked this question to marketing leaders, regardless of industry, company size, strategy, or seniority, their answers were remarkably consistent [Figure 1]:

- #1. Revenue/volume growth
- #2. Customer acquisition
- #3. Brand equity improvement

Figure 1: How well does your organisation define marketing-driven growth?



This alignment is no coincidence; it reflects a deep consensus in the marketing community and directly mirrors the Kantar Blueprint for Brand Growth, which unpacks the most effective path to sustainable growth.

Revenue and volume growth are the ultimate outcomes of a successful marketing strategy;

clear, measurable, and non-negotiable for any ambitious organisation.

With **Customer acquisition**, we see that penetration is widely recognised as the engine of growth. Yet, the Blueprint for Brand Growth challenges us to look beyond penetration alone, reminding us that true, lasting growth requires more than simply expanding reach. Brands that grow sustainably resonate with people, build emotional connections, stand out with distinct assets, and stay consistent over time. To drive long-lasting growth, it's crucial to build strong connections in consumers' minds to make your brand easy to choose, in other words, build a strong brand equity.

Brand equity improvement is about building brands that are meaningful, different, and salient [MDS]. Brands that stand out, connect emotionally, and remain top-of-mind for consumers. This is not just about awareness, but about creating brands that people actively choose and advocate for.

Nearly all respondents expressed

confidence in their ability to influence these three metrics.

This confidence says a lot: it signals that marketing leaders know where they can make an impact. In fact, confidence levels were high for most of the growth drivers mentioned in our survey, with the greatest certainty around brand equity and brand penetration, where **100%** of respondents reported feeling confident in their ability to deliver.

So where does this confidence begin to waver? While still robust [above **70%**], confidence drops somewhat when it comes to profit growth and innovation rate or new product success. Here, we observed a notable proportion of more neutral responses (**24%** and **22%** respectively), suggesting a degree of uncertainty or caution. Innovation is critical to driving growth, and we will explore this topic later in the paper.

However, from our deep-dive interviews, one question emerged: Is this really a lack of confidence in innovation, or does it reflect the way innovation is defined and operationalised within

organisations?
Respondents drew a clear line **between breakthrough innovations**, which require dedicated processes, time, and budget, and **experiments**, which are more flexible, iterative, and often less visible but no less important for long-term growth.

“Innovation, in my view, is a structured process of ultimately developing yourself further, whereas experimenting simply involves trying something, stopping immediately if it doesn’t work, and moving on.”

Willemijn Bouman

Chief Brand & Product Officer at Pink Gellac



These smaller-scale experiments, while less dramatic than breakthrough innovations, can play a pivotal role in shaping an organisation’s innovation roadmap. In fact, the ability to experiment, learn, and adapt quickly may be the most undervalued growth lever of all. Most CMOs are able to defend big spending on innovation without tangible results at the start. They often do it because this is the only way to get some innovation off the ground. On the other side, CEO/CFO might be reluctant to commit more.

“I just started with small innovations, one after the other. Building trust at the beginning is what eventually allows you to set directions and define strategy.”

Marieke Willemsen

CMO at Eurofiber

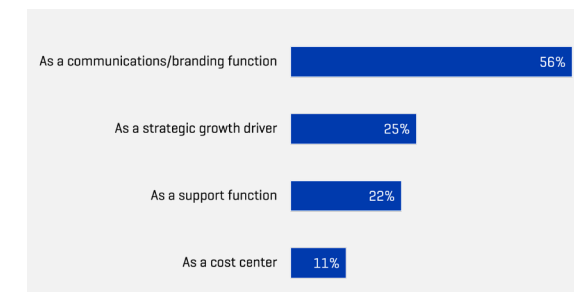


Who owns the **growth** agenda?

The first pillar of the Kantar Blueprint for Brand growth is **Predispose More People**, in other words, increasing the probability of purchase by strengthening the predisposition everyone has toward the brand. For that, brands need to build positive mental perceptions and salience with current and future buyers through impactful experiences and exposures. If you are a marketer, you definitely know that this goes much beyond communication and branding. Increasing your brand equity goes much deeper on a strategy level.

Yet, our research reveals that marketing is still mostly seen as a “communication and branding function.” [Figure 2].

Figure 2: What is your general feel about how non-marketing executives perceive marketing in your organisation?



The numbers are telling: only **42%** said growth is “mostly or fully owned by marketing” in their organisation, against **58%** saying that it is slightly, moderately or not at all. In other words, the **majority of organisations do not see the marketing function and the CMO as growth leaders** [Figure 3].

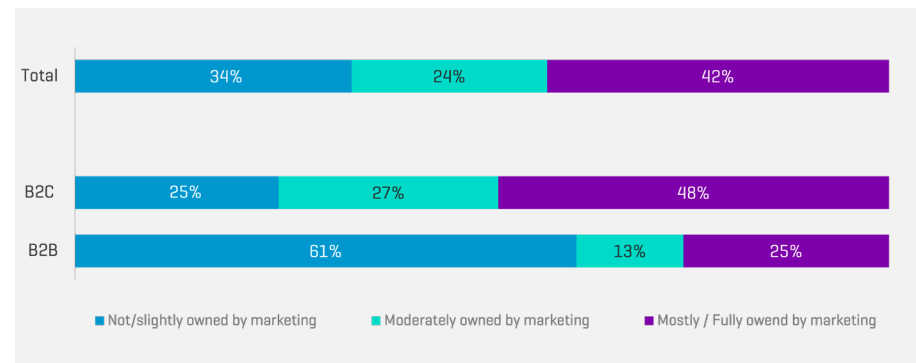


Figure 3: To what extent is growth seen as a marketing responsibility in your organisation?

When digging, we see that it's far more difficult for marketing in B2B companies to be perceived as a growth driver, with **61%** saying that marketing is slightly or not at all seen as responsible for growth.

So if not CMOs, **who owns the agenda?**

In many organisations, the CEO or CCO is viewed as the true owner of the growth agenda, and when talking with our respondents directly, we agreed that this makes sense.

But here's the paradox: "who is owning the growth agenda" is

a question that only marketing seems to ask itself. We could think that this persistent self-doubt may be holding marketing back from claiming its rightful place as a strategic growth engine.

However, during our discussions, many CMOs recognised that driving growth is **a shared responsibility**. Collaboration across functions is essential, and in some industries, marketing is deliberately positioned as an executional function rather than a strategic one.

But the core challenge remains: **demonstrating the added value of marketing** in a way that is

visible, credible, and relevant to the wider business.

Which leads to a critical reflection: Is the CMO actively claiming the role of growth leader, or passively accepting the narrower Marcom label that tends to stick?

Ultimately, the perception of marketing's role as a growth driver is shaped by a complex mix of factors: organisational culture, regional context, industry dynamics, and the ability to connect marketing outcomes to business results. Until marketing can consistently demonstrate its impact beyond communications and branding, it will continue to struggle for recognition as the true engine of growth. In chapter 2, we will go deeper into this and see how marketing leaders are overcoming their barriers, but also which approach they typically take to reaffirm marketing's credibility and importance.

Growth strategy: The thin line between short-term and long-term

When it comes to growth strategy, marketing leaders across industries, company sizes, and strategic orientations all describe a similar balanced approach between long-term and short-term visions and initiatives. On paper, this dual focus is almost universally endorsed. In practice, however, the reality is far more complex.

For the majority of respondents, short-term pressure dominates.

Short-term business pressure from executives and stakeholders emerged as the number one barrier limiting marketing's ability to drive growth. This theme was echoed in the open responses and deep-dive interviews, with some leaders

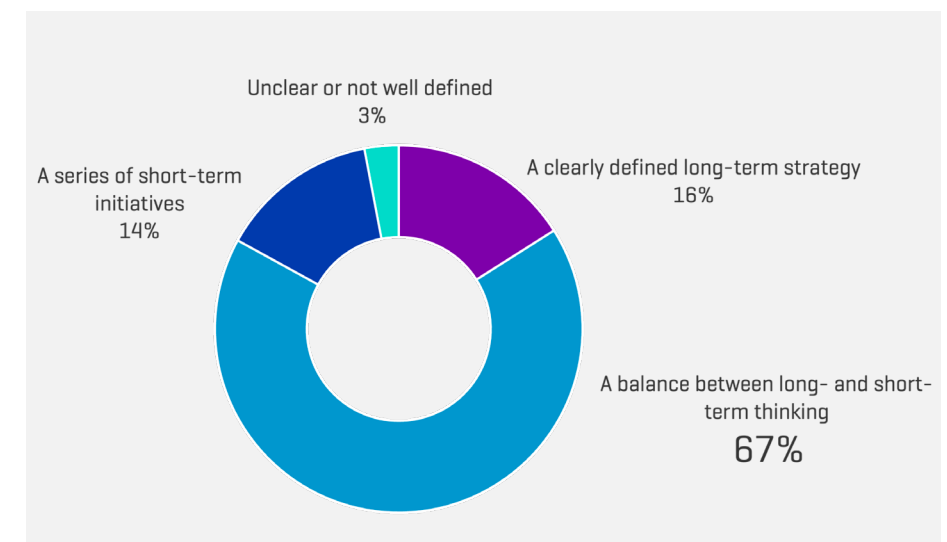
describing the relentless demand for immediate results.

So we could argue if their strategies are in fact balanced, or if this is instead a utopic situation. Well, it is not black and white; short-term pressure and urgency don't prevent long-term impact. In fact, several leaders highlighted that a series of well-chosen short-term initiatives can contribute to long-term brand building and sustainable growth.

"I think you really have to improve business together, start with short-term results and build from there."

Marieke Willemsen
CMO at Eurofiber

In your opinion, what best describes the growth strategy at your company?



The most effective CMOs are those who can translate quick wins into lasting value, using early successes to build trust and secure investment for longer-term brand initiatives. And bigger companies with more experienced CMOs or marketing directors are generally less frustrated by this general request for short-term focus. Our takeaway? In a world of pressure, the short-term rules. Most marketing leaders aim for a balanced growth strategy, but

in reality, short-term pressures often overshadow long-term ambition. The challenge isn't choosing one over the other, but finding ways to deliver quick wins while building lasting value.

CHAPTER 2

Preconditions & barriers: What’s blocking growth

The foundations of growth

Our research has identified a clear top 3 preconditions that marketers consider essential for driving growth [Figure 4]:

- #1. Strong brand positioning
- #2. Customer and marketing insights
- #3. Organisational alignment and leadership buy-in

Figure 4: Which of the following do you believe are the top drivers of long-term sustainable growth in marketing?

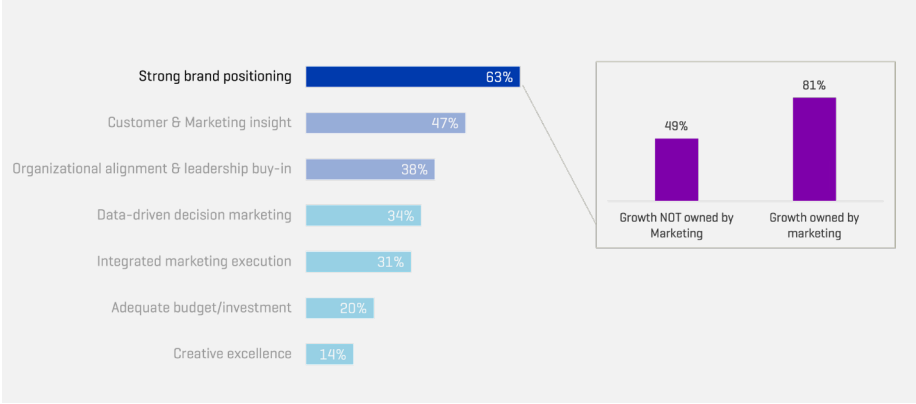


While this ranking reflects the overall consensus, it also reveals interesting nuances across different sub-groups of respondents.

Let’s start with **strong brand positioning**. When we look at the answers at a sub-group level, we see a contrast between respondents who previously answered that marketing contributes to growth versus those who did not.

Among respondents who indicated that growth is **not** owned by marketing, **49%** cited brand positioning as a driver, while this answer rises to **81%** for those who work in an organisation where marketing is identified as a growth driver [Figure 5].

Figure 5



functions, marketing is uniquely positioned to uncover, interpret, and act on consumer needs and behaviours—making it not just a driver of growth, but an essential bridge between the brand and its audience. In a landscape where differentiation and relevance are paramount, marketing's ability to generate and leverage customer insights stands out as one of the most powerful levers for long-term success.

Knowing your consumer is not just a best practice, but a prerequisite for any brands. However, we can observe that marketing leaders in technology and financial services are slightly more likely **[50%]** to cite consumer insights as a top growth driver, compared to FMCG and retail **[43%]**. This is particularly interesting when we consider the everyday expectations consumers have of brands in these sectors, where understanding needs and pain points is crucial.

Company size also plays a role: The larger the organisation, the less consumer insight is perceived as a top driver. In general, bigger companies are focusing more on

integrating marketing executions and enhancing organisational alignment.

For the 3rd top driver [organisational alignment and leadership buy-in], the broader data tells a promising story. A strong majority of CMOs [72%] believe that their organisation have strong leadership and support from the executive team.

Beyond this top 3 of growth preconditions, another factor was part of our research questions: **Creative excellence.**

While not ranked as highly overall, its strategic importance should not be underestimated.

According to Kantar, creative excellence is the second most powerful driver of campaign profitability, after brand size. In fact, it has twice the impact of reach on a brand's salience. Yet, our data reveals a significant perception gap across industries: while **21%** of respondents in FMCG identified creative excellence as a top growth driver, only **8%** of marketers in technology, financial services and

healthcare did the same. This disparity reflects a difference in mindset, not in impact, because the data is clear: **creative excellence drives growth across all categories.**

To better understand the impact, we must return to the Blueprint's three pillars:

- **Predispose More People**
- **Be More Present**
- **Find New Space**

Each of these is directly influenced by the strength of a brand's positioning and by the creative that brings it to life.

To **Predispose More People**, brands must build mental availability through emotionally resonant and distinctive creative.

To **Be More Present**, they must execute consistently across channels and touchpoints, guided by a clear and coherent brand identity.

To **Find New Space**, they must innovate in ways that feel authentic, anchored in a brand narrative that is both meaningful and different.

In this context, creative excellence is not just executional, it's strategic. It is the vehicle through which brand positioning is expressed, reinforced, and scaled. And when done well, it becomes a multiplier across all three pillars of growth.

Main *barriers* to growth

Despite the ambition and strategic vision of today's CMOs, the path to marketing-led growth is frequently obstructed by persistent, systemic barriers. As highlighted in the previous chapter, short-term pressure from executives and stakeholders stands out as the most commonly cited barrier, with **49%** of respondents identifying it as their challenge. In this chapter, we turn our attention to the other obstacles that continue to hinder marketing's ability to drive sustainable growth.



Siloed Functions and Misaligned KPIs; The Vicious Cycle:

One of the most persistent challenges revealed by our research is the way misaligned KPIs and siloed functions reinforce each other, quietly undermining marketing's ability to drive growth. According to our survey, **49%** of marketing leaders place siloed functions and poor internal alignment as a barrier for growth, and **24%** for misaligned KPIs.

These two obstacles rarely appear in isolation; when one is present, the other is often close behind.

"A clear KPI aligned with company objectives is essential for a CMO to be heard in the boardroom. Prioritising brand positioning and market share KPIs grants marketing long-term authority, unlike short-term lead generation metrics. Too often, marketing is evaluated solely on recent campaign results regarding leads, rather than on sustained value creation."

Joost Vossen

VP Brand Strategy & Go-to-Market at Elsevier

The result is a cycle: silos make it harder to agree on what matters, and misaligned KPIs make it harder to break down those silos.

This dynamic is especially pronounced in larger organisations and B2B environments, where complexity and the number of stakeholders multiply.

Our deep-dive interviews bring this to life: several leaders described how, in the absence of shared KPIs, each function optimises for its own success, rather than for the business as a whole. It was mentioned that it's crucial to have a clear KPI that's directly linked to company objectives, yet, too often, marketing is judged only on the success of the last campaign, not on long-term value creation.

Now, you might expect another important barrier:

Lack of budget:

The third top barrier for our respondents, with some more importance for FMCG companies, and maybe with little surprise, for smaller companies. **23%** of small

companies [1-99] put this barrier as number one, compared to **11%** for companies gathering more than 1,000 people.

But is the lack of budget a fatality, or is that also coming as part of a vicious cycle?

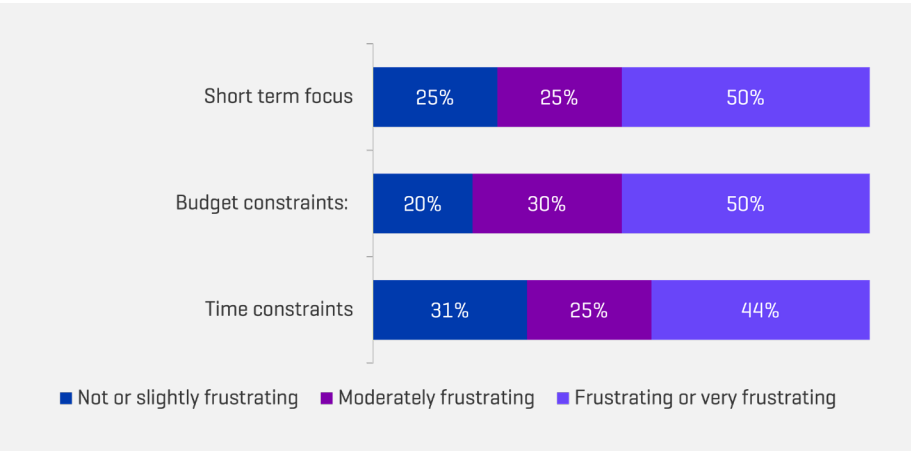
"If you're only seen as the team that spends, not the team that builds, you'll always be fighting for budget."

Annemarie Joosen

Manager Marketing, Sales & Business Development at VVV Cadeaukaarten



Figure 6: To what extent would you say the barriers below are frustrating you in terms of leading more innovation?



When we shared these findings during the deep-dive interviews, some respondents expressed their surprise, as they tend to view the challenge more as a call to get creative with how existing budgets are allocated.

Top barriers to drive innovation:

We have already touched on the topic of innovation and observed that marketers' confidence in their innovation rate and new product success is nuanced. Yet, innovation remains a critical growth driver.

Innovation enables brands to enter new categories and markets. Let's think about Uber Eats' expansion from ride-hailing to food delivery, LinkedIn's move into training, or Dettol's shift from body to home hygiene. These are not just incremental changes, but strategic leaps that redefine what a brand can be.

So, in addition to exploring barriers to drive growth, we also asked participants about the obstacles they face in driving innovations [Figure 6].

To start with, the theme of **budget constraint** flows directly into the barriers faced in driving innovation.

The results show that budget constraint is among the two most cited barriers to innovation, with **half** of the respondents identifying it as a key challenge. As discussed in Chapter 1, this is particularly relevant for breakthrough innovations, which require dedicated investment, time, and patience, qualities often sacrificed in the pursuit of immediate results.

Short-term focus emerges as the other top barrier to innovation, also cited by 50% of respondents. This is especially problematic for breakthrough initiatives, which cannot be realised without a longer-term commitment. In contrast, smaller, more frequent innovations, those "try-outs" referenced in Chapter 1, can often be executed within tighter budgets and timelines, making them less vulnerable to short-term pressures.

Time constraint is the third biggest barrier, cited by **44%**

of respondents. This further highlights the tension between the need for rapid delivery and the reality that genuine innovation often requires space to experiment, iterate, and learn.

Approach of CMOs to overcome these barriers

Faced with persistent barriers such as misaligned KPIs, siloed functions and budget constraints, today's CMOs are not standing still. Our research reveals a clear pattern of how marketing leaders are navigating these challenges.

First and foremost, CMOs are **engaging stakeholders early**. Rather than waiting, they are bringing key decision-makers and cross-functional partners into the conversation early on.

Second, **storytelling and visualisation** seem to have become essential practices for CMOs. Although data-driven decisions are important, they can be boosted. Marketers are translating their strategies, results into compelling narratives, using visuals and real-world examples to make the case for marketing's impact.

Third, CMOs are presenting clear data, backed by robust business cases. Today's marketing leaders are grounding their proposals in market research, trends, and ROI forecasts. By demonstrating how marketing investments contribute to business outcomes, and by aligning these cases with the KPIs of other functions, CMOs are able to secure buy-in and unlock resources, even in budget-constrained environments.

Throughout our interviews, a common thread emerges: overcoming barriers is about working smarter and building coalitions, telling the right story, and making the value of marketing visible and credible to the entire organisation. These tactics are widely used. But one approach, though less popular, may deserve more attention: playing hardball.

In our deep-dive interview, several CMOs acknowledged the need to be more assertive, especially when marketing's strategic role is questioned or sidelined. Remaining persistent, staying aligned with long-term priorities, and advocating for marketing's tactical role (supported by the right evidence) were seen as essential.

"Sometimes you have to bang your fist on the table—not emotionally, but with a clear business case and a KPI that matters to the board."

Joost Vossen

VP Brand Strategy & Go-to-Market at Elsevier

CHAPTER 3

What's keeping CMOs awake at night

Digital transformation and AI.

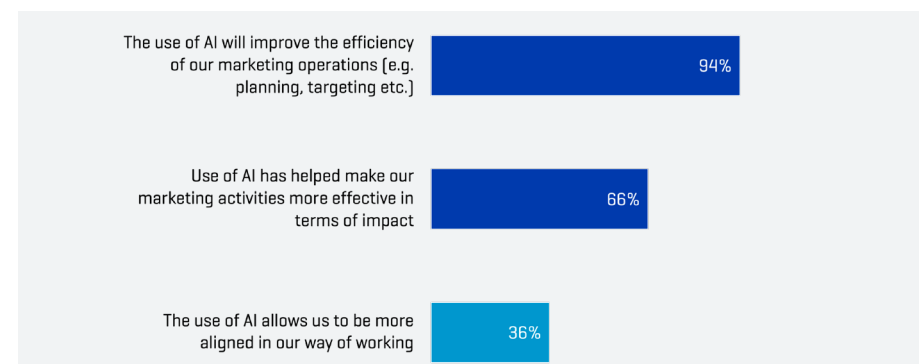
If there is one topic that consistently dominates the minds of marketing leaders today, it is the relentless advance of digital transformation, and most notably, the rise of artificial intelligence.

Across industries and markets, 72% of CMOs agree: AI and digital transformation are set to have the most profound impact on

marketing's growth trajectory over the next 12 to 24 months. The promise is compelling: greater efficiency and creative possibilities [among others] that were unimaginable just a few years ago [Figure 7].

Yet, beneath the surface, this excitement is laced with a very real sense of uncertainty.

Figure 7: To what extent do you agree or with the following statements?



CMOs are trying to find the balance between how to harness AI for efficiency without sacrificing the human touch that makes brands distinctive. They are rethinking how to staff and structure their teams as AI agents become more prevalent, and questioning how to maintain brand uniqueness in an advertising landscape increasingly shaped by algorithms. The challenge of using data both effectively and responsibly [balancing privacy, ethics, and compliance] remains ever-present. We like to call it the balance between AI and HI [human intelligence]. And as global competitors invest a lot in AI, the pressure to keep pace is intensifying, with many leaders wondering if they can adapt quickly enough to avoid being left behind.

But here, the term "AI" needs to be clarified. Our deep-dive conversations surfaced a crucial distinction: **predictive AI**, which has quietly powered marketing analytics, forecasting, and creative testing for years, versus the much newer and more disruptive **generative AI**.

"We've been using machine learning and AI in analysis and data for 10, 15 years. The hype now is around generative AI—and that's really different."

Theo van Uffelen
Marketing Director
at Yakult Europe



It is this new wave of GenAI that is fueling both the excitement and the anxiety.

This tension is not unique to our study. In fact, it mirrors the broader pattern we observed in a Kantar research conducted in 2024 **"GenAI in marketing—fear or FOMO"**, which engaged over 50 marketing and capability leads worldwide. The findings were striking: while nearly all respondents agree that GenAI will impact marketing, most organisations are still in the early stages of adoption. The question is no longer if GenAI will change marketing, but how much, and how ready we are for it. The study identified five key challenges that consistently hold organisations back: limited understanding,

ethics and compliance, data management and oversight, lack of capability, and organisational readiness.

Yet, the research also points to a path forward. Kantar developed a framework from these interviews, identifying four levels where GenAI can drive value:

Strategic Advancement: Building long-term brand strategies and transforming how brands connect with consumers.

Brand Acceleration: Empowering long-term planning and innovation, acting as a catalyst for trend forecasting, team guidance, and aligning marketing with overarching business goals.

Operational Efficiency: Streamlining day-to-day execution, automating processes like data management, tracking, and workflow optimisation. Think here about the impact that AI agents will have, for instance!

Marketing Automation: Engaging consumers through tailored content in real time, personalising

messaging across channels, and automating media buying for greater efficiency and connection.

From our research, we can glimpse a new relation to AI, which can make us wonder: Is GenAI still really purely fear? Although it might still appear as such, when diving into this topic during our deep-dive interviews, the outcome became much more nuanced: As adoption accelerates, the mood is changing. What was once a source of fear is becoming more natural, even a routine. CMOs describe how experimentation with GenAI has moved from isolated pilots to everyday practice. The initial anxiety is giving way to curiosity and pragmatism. Marketers are learning to use GenAI not just for operational efficiency (e.g. automating reporting, streamlining asset creation) but also for strategic advancement: accelerating innovation, enhancing planning, and elevating brand building.

In this new era, the winners will be those who can balance experimentation with vision, embedding GenAI in a way that enhances both efficiency and

distinctiveness, making marketing not just faster, but smarter and more human. The journey is far from over, but the direction is clear: GenAI is not a replacement for marketing's core strengths, but a force multiplier for growth.

And as we referred to in chapter 1, what remains crucial to drive growth is to focus on understanding consumers first, which is where marketing's value is strong, and where AI can help boost efficiency.

"First understand what your consumers want and how your market moves. Then translate that into an idea, execute it, and tell a story about it. And yes, for storytelling, Generative AI can be very useful."

Theo van Uffelen

Marketing Director at Yakult Europe

The uncertainties and frustrations impacting the teams

Beyond the challenges of digital transformation and AI, our research uncovered another layer of uncertainties and frustrations that continue to shape the reality for marketing teams. When we asked “To what extent do you feel the following market uncertainties impact your marketing team’s ability to drive growth?”, respondents revealed a clear hierarchy of concerns, some driven by external market forces, others rooted within the

organisation itself [Figure 8].

Competitive Pressure: The Dominant Force

The most significant uncertainty, cited by 59% of respondents as having a “significant” or “strong” impact, is **competitive pressure**. This concern is especially pronounced among FMCG and retail marketers, as well as those operating in globally or regionally led organisations. The rise of AI has only intensified this challenge,

enabling faster, more targeted campaigns and accelerating the pace of innovation across the industry. As a result, the stakes for differentiation and defending market share have never been higher. The sense of urgency is palpable: those who fail to keep up risk being left behind in an increasingly crowded and dynamic marketplace.

Food for thought: Competitive pressure is not only the most cited uncertainty, it’s also evolving in nature. Increasingly, it stems from non-branded or fake-branded goods that offer significantly better value for money, challenging established players. In this context, the idea that market leaders have more to lose than to gain becomes particularly relevant. Inflation and a lack of innovation may be compounding this vulnerability, making it harder for legacy brands to defend their position.

Profit Pressure: The Internal Squeeze

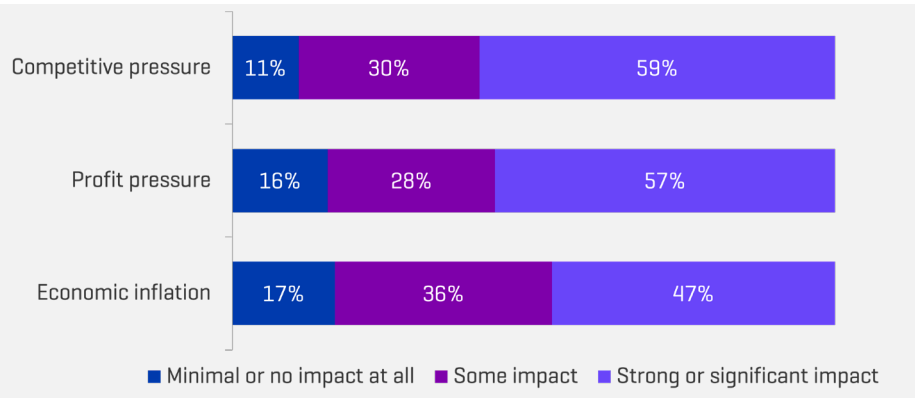
Closely following is profit pressure, with **57%** of respondents [again, particularly

in FMCG] reporting a significant or strong impact on their teams’ ability to drive growth. Internally, marketing leaders are expected to deliver growth whilst simultaneously improving margins, often in the face of rising costs and operational constraints. The tension between investing for long-term brand health and delivering short-term financial results is a recurring theme throughout our research. As one respondent noted, *“Influencing profit growth amid rising costs and supply chain issues is becoming an ever more complex balancing act.”* The relentless pressure to justify spend, optimise, and prove return on investment can sometimes overshadow the strategic ambitions of the marketing function.

Economic Inflation: A Universal Challenge

Economic inflation rounds out the top three uncertainties, with **47%** of respondents across all sub-groups citing it as a significant or strong impact. Unlike competitive or profit pressure, the impact of inflation is felt evenly across

Figure 8: To what extent do you feel the following market uncertainties impact your marketing team’s ability to drive growth?



industries, company sizes, and organisational structures. Rising costs (whether in media spend, production, or talent) are squeezing budgets and forcing difficult choices, and the need for some extra creativity.

What's not keeping marketers awake?

Interestingly, some issues that might be expected to cause concern, such as the energy crisis, weakening labour productivity, political instability or tariff discussions, were not prioritised as concerns by respondents. This suggests that, for most marketing teams, the immediate pressures of competition, profitability, and inflation far outweigh broader macroeconomic or geopolitical factors.

CHAPTER 4

The final word: What did we learn together

This research has illuminated the evolving landscape of marketing-led growth, revealing both the enduring fundamentals and the new frontiers that today's leaders must navigate. Several key insights emerge:

Growth remains a multi-dimensional challenge. While revenue, customer acquisition, and brand equity are universally recognised as the pillars of marketing-driven growth, the confidence to deliver on these ambitions is shaped by organisational culture, leadership alignment, and the ability to balance short-term pressures with long-term vision.

Marketing's strategic role is still contested. Despite its potential to drive growth, marketing is too often seen as a communications function rather than a true engine of value creation. The most effective CMOs are those who

can demonstrate marketing's impact in ways that are visible, credible, and relevant to the wider business.

Capability and creativity are critical levers. Strong brand positioning, deep consumer insight, and organisational alignment are the foundations of sustainable growth. Creative excellence, when rooted in strategy, acts as a multiplier across all dimensions of the Kantar Blueprint for Brand Growth.

Barriers are persistent but not insurmountable. Siloed functions, misaligned KPIs, and budget constraints continue to hinder progress, especially in larger and more complex organisations. Yet, the most successful marketing leaders are those who engage stakeholders early, build coalitions, and use data-driven storytelling to secure buy-in and unlock resources.

Innovation requires both investment and patience.

Breakthrough innovation is often sacrificed to short-term pressures and budget limitations, while smaller, iterative experiments can be a powerful—if undervalued—lever for learning and adaptation.

AI is a force multiplier, not a replacement.

The rise of digital transformation and generative AI is reshaping the marketing landscape, offering new efficiencies and creative possibilities. However, the journey from fear to fluency is ongoing. The winners will be those who can harness AI to enhance (not replace) the human touch that makes brands distinctive.

On a side note, this research reaffirms the enduring power of human intelligence. In a world of algorithms and automation, it is the marketer's ability to understand, interpret, and connect with consumers that remains irreplaceable. Marketing's true value lies not just in data or technology, but in its unique capacity to bridge insight and imagination, to turn

understanding into action, and ambition into growth.

Our closing statement? Marketing is not just a function; it's a force.

The role of marketing is still evolving, and with it, the expectations placed on marketing leaders. Growth is no longer a single metric, it's a multidimensional challenge that demands strategic clarity, creative courage, and relentless collaboration.

The most effective CMOs are not waiting for permission to lead. They are claiming their seat at the table by demonstrating impact, aligning with business KPIs, and building trust through short-term wins that unlock long-term value. They are breaking silos, reframing marketing as a growth engine,

and using data not just to justify spend, but to shape strategy. They are innovating from within their brand DNA, ensuring that every new idea is both credible and commercially viable.

And while AI is reshaping the landscape, it is human intelligence, our ability to understand people, tell stories, and build meaning, that remains our greatest asset.

So where do we go from here? We stop asking for validation. We start showing up with vision. We lead with confidence, backed by evidence. And we remember that marketing's power lies not just in what we say but in what we build, influence, and grow.

The future of marketing is not something we observe. It's something we shape.

Sources

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[Download here](#)

GenAI in marketing-fear or FOMO [2024]

[Download here](#)

Colophon

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Our purpose is to elevate marketing. We inspire, connect and develop CMOs in their work and leadership. You can find more information at cmotalk.nl or cmotalk.com

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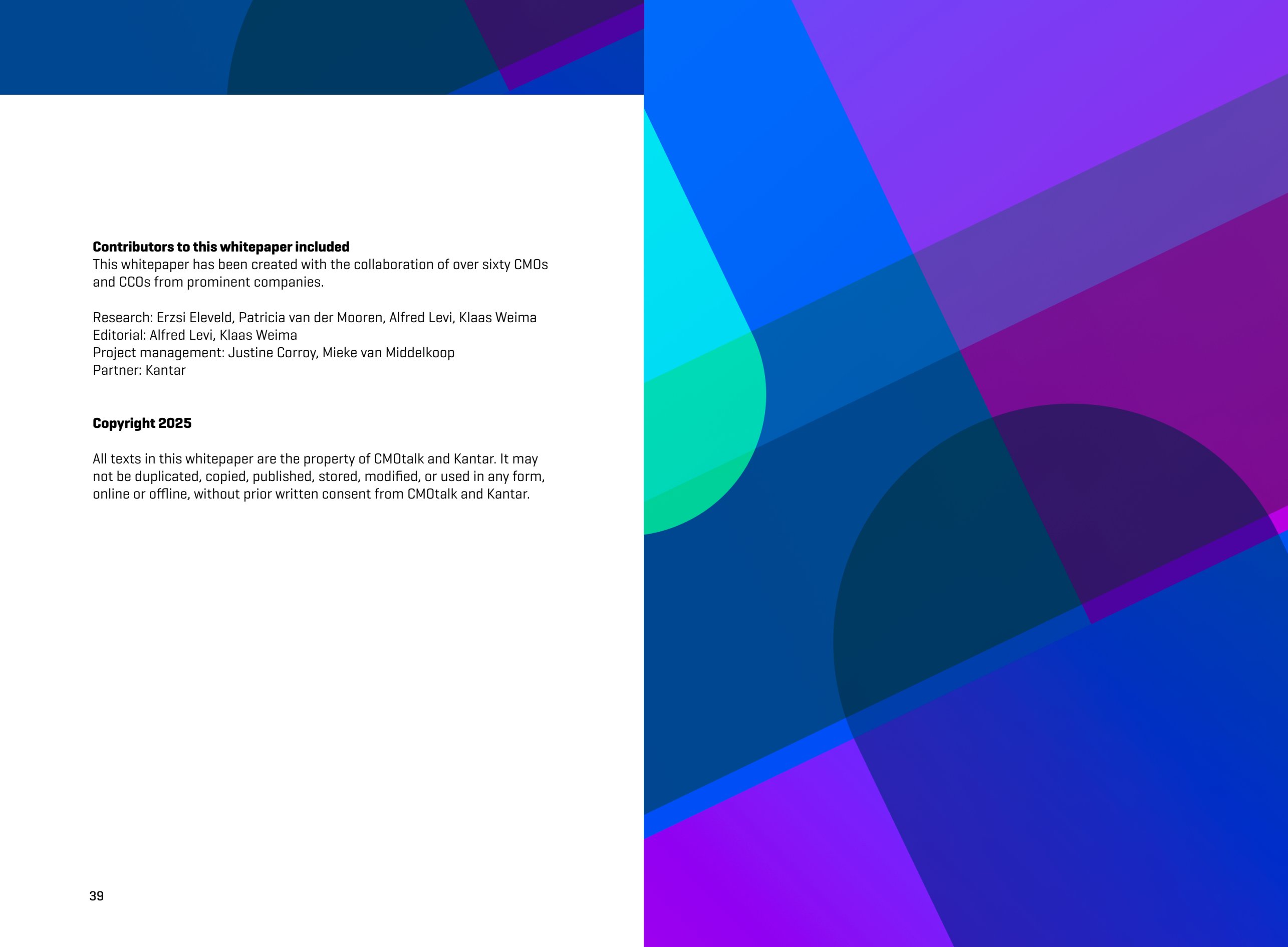
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