

**DENTSU CREATIVE  
2025 CMO REPORT**

# **AGENTS OF REINVENTION**

**Marketing at the Intersection  
of AI and Human Ingenuity**



**PART OF THE DENTSU CMO NAVIGATOR SERIES**

## 7 FOREWORD

# Welcome to our annual CMO report

"What we clearly see in this report is that while clients are embracing AI at pace, they remain committed to the power of human craft and creativity. As we adopt AI at scale, it places an ever-greater premium on originality and innovation: AI is exceptionally good at prediction but creativity by its very nature is unpredictable. What is most exciting is when AI and human creativity come together to unlock new possibilities, spot new patterns and shape new futures. That's why we see clients committing to invest more than ever in innovation in 2026 and beyond."



**YASU SASAKI**

GLOBAL CHIEF CREATIVE OFFICER, DENTSU

"The future of marketing is about augmenting human ingenuity with AI to enable a level of pace and personalization not previously possible. It's not about doing more with less, it's about doing things we couldn't do before: connecting creativity, media, data and production to meet the right customer with the right message in the right moment, leveraging the modern content supply chain to show up in more of those moments than was possible in the past. What we hear from our clients, and the report bears that out, is that they need seamless integration of data, AI enabled production and their existing martech stack to realize the potential of real time creativity to accelerate growth."



**ABBEY KLAASSEN**

GLOBAL BRAND PRESIDENT, DENTSU CREATIVE

"Today's marketers face an extraordinary series of paradoxes and contradictions. Automation is vital to keep up, humanity is vital to stand out. They must win with the algorithm or be invisible, but optimize too closely and they become indistinguishable. If every brand chases the same signals with the same tools, we are simply running harder to stand still. The result is that the more we embrace AI, the more human we must become; unearthing the deeply personal truths, grounded in culture, that resonate, differentiate and scale."



**PATRICIA MCDONALD**

GLOBAL CHIEF STRATEGY OFFICER, DENTSU CREATIVE

## ➤ INTRODUCTION

# AI has become our industry obsession, dominating budgets, conversations, and planning.

Every week seems to bring an exponential leap forward, triggering both wild excitement and existential anxiety. Agentic AI represents the next leap forward, transforming search, commerce and user experience with new levels of autonomy and personalization.

Our 2025 CMO Report makes it clear that AI is already deeply embedded in marketers' everyday ways of working. Almost every CMO surveyed is using AI in their personal workflows: simplifying, synthesizing and shortcutting. CMOs are long past experimenting with the new, they are investing, at scale. Which means, of course, AI must be deeply embedded in agency workflows, from insight to production to testing and measurement.

Yet our study also points to a (perhaps inevitable) counter tension. The more advanced AI becomes, the more we crave humanity; a flaw, a quirk, a nuance that only another human would spot. It is no coincidence that as AI accelerates so too does the creator economy, a billion dollar disruptor with human to human connection at the heart, at least for now. (AI Influencers have entered the chat en masse).

At the intersection of trend and counter trend are the algorithms that govern so much of what we see and what we shop for today. Feeding the algorithm's desire for novelty requires an ever-faster stream of content-signalling recency, aiding discovery. AI plays a pivotal role in enabling us to meet the demands of the newsfeed. Yet simply following the algorithm - targeting the same signals with the same tools as everyone else - can yield diminishing returns. The more we chase relevance, the more it eludes us. The more we strive to stand out, the more similar we become.

As AI helps us scale and personalize our content at pace, the human tension at the heart of our thinking becomes more important than ever. Why scale what doesn't resonate?

## ➤ INTRODUCTION

# Perhaps ironically, the rise of the machines will make humanity more valuable than ever before.

A world powered by AI and governed by algorithms creates an ever greater demand for intimate human understanding of people, communities and fandoms. It calls on us to identify culturally specific micro-insights with potential to travel beautifully. To leverage rich cultural intelligence to help brands scale community first. To embrace depth, surprise and serendipity alongside AI's promise of scale, predictability and order.

Marrying AI and authentic human intelligence ensures we don't just make more content, we make more intelligent and impactful content. Content that connects the right customer with the right message in the right moment. It ensures we balance the twin imperatives of Winning in Culture and Winning in Commerce, to help brands and businesses thrive in the age of the algorithm.

It is this balance that today's CMOs are seeking; the coming together of craft and technology, AI and human truth. While they agree that Agentic AI will transform their business, they believe trust, taste and powerful brand preference will become more important than ever.

While they are investing in predictive intelligence, they are looking to fandoms and online communities as rich sources of insight, with 86% agreeing that talking to real customers is important and irreplaceable, and 86% that "AI will give talented individuals superpowers, not replace them."

At Dentsu Creative, we believe the future lies in using AI to augment human intelligence and ingenuity. When repetitive, table-stakes tasks are automated, the premium we place on original, individual thinking will increase dramatically.

In the age of the algorithm what is most human, unpredictable and personal will be most distinctive and most shareable. Perhaps ironically, the rise of the machines will make humanity more valuable than ever before.



## SETTING THE SCENE

# CMOs in 2025 are feeling remarkably resilient amidst constant volatility.

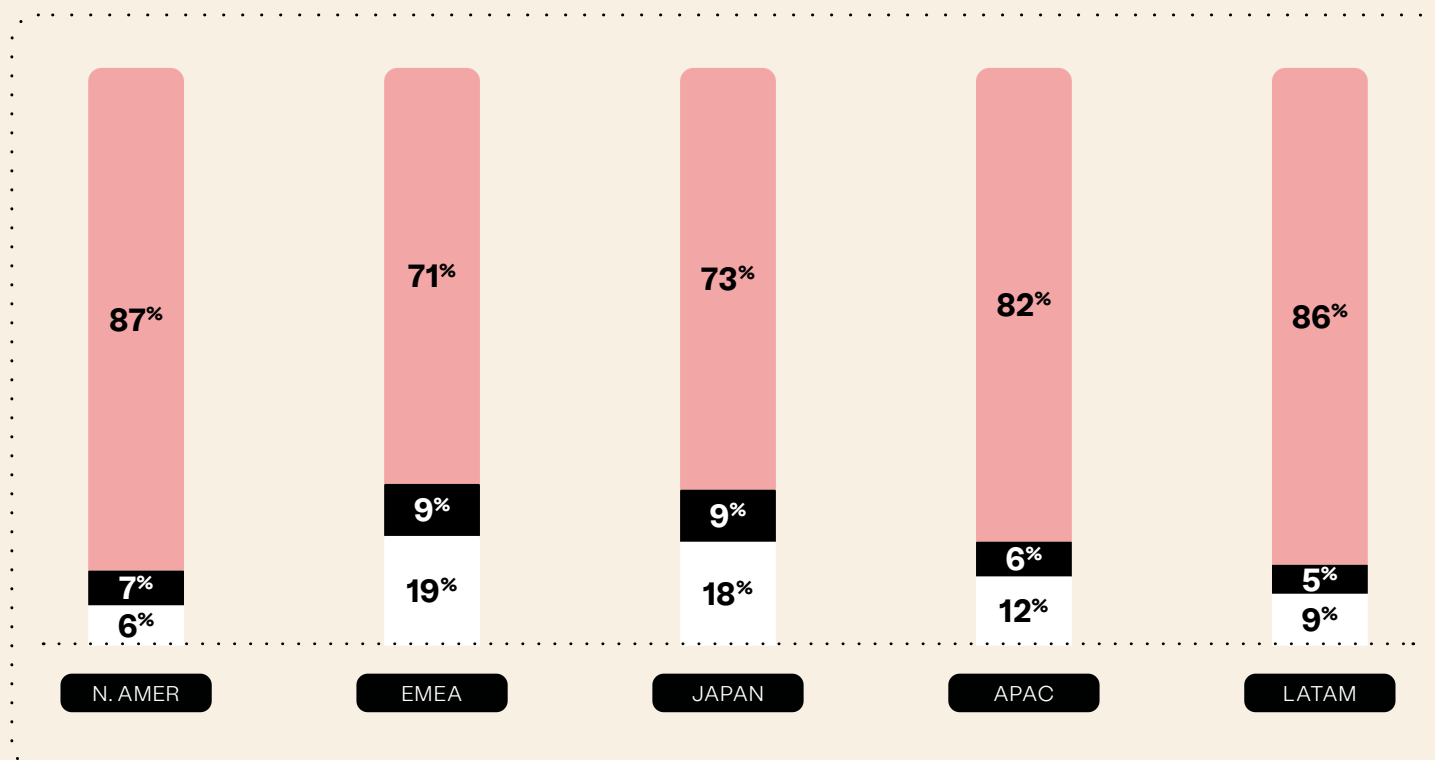
A majority believe that their budgets will increase over the next 12 months. Those in Latin America and North America are feeling particularly confident, with **86%** and **87%** respectively anticipating an increase. The largest cohort of CMOs across all regions expect their budgets to increase by between 5 and 10%.

This is perhaps aligned to a degree of economic optimism; globally **25%** of CMOs feel that the economy will get significantly better, and **47%** that it will get “somewhat” better in the coming year. There are however significant differences across markets and regions. **24%** of those in the UK believe the economy will get somewhat worse (7% significantly worse), **35%** in Spain and **32%** in Mexico.

CMOs' cautiously optimistic outlook, together with their firm belief that the industry will fundamentally transform in the coming years shapes their investment plans for 2025 and beyond, and informs the key themes and imperatives from our survey.

● INCREASE ● STAY FLAT ● DECLINE

### HOW DO YOU EXPECT YOUR MARKETING BUDGET TO CHANGE OVER THE NEXT 12 MONTHS?



# 10 Key Themes for Marketing in 2025 and Beyond

## 01. ANTICIPATE THE ALGORITHM

Winning with the algorithm means leading, not following. Simply chasing the latest meme or moment yields diminishing returns, escalating costs and decreased cut through.

## 02. INVEST IN INTIMACY

Perhaps counter-intuitively, what wins with the algorithm is humanity. The irreplaceable human-to-human insight that sparks recognition, the outliers that unlock innovation.

## 03. CONNECTING IDEAS

Today's CMOs overwhelmingly agree that brands today are built in partnership with creators, platforms, and culture makers, demanding a new approach to defining and dimensionalizing brands.

## 04. INFLUENCE THE OUTCOME

Given the importance of co-creation, it's unsurprising to see that CMOs are planning to significantly increase their influencer investment, thinking strategically about the role of influencer content in driving visibility and conversion.

## 05. THE CULTURE CONUNDRUM

While marketers instinctively agree brands today are built through culture, few feel confident to do it consistently, credibly and at global scale.

## 06. THE INNOVATION IMPERATIVE

As tried and tested techniques prove less effective, innovation is no longer a nice-to-have but a must have. 90% of marketers want to see innovation pointed against their most urgent business challenges.

## 07. ARTIFICIAL ASSISTANCE

AI is woven into CMOs personal working patterns, day in, day out. Fueling a desire for transparency around agency workflows, and new conversations on agency pricing models.

## 08. HUMAN EXPERIENCE

As marketers feel less confident reaching customers through traditional channels, building brand through experiences remains key; even if the experiences of the future look very different to today.

## 09. INTELLIGENT CONTENT

Scale for scale's sake is losing appeal; today's CMOs seek dynamic content oriented around the customer journey, but for many production at scale remains a barrier.

## 10. IN TASTE WE TRUST

CMOs anticipate that Agentic AI will enable leaps forward in customer experience and personalization, but believe trust, taste and brand preference will become more important than ever before.

## 01. ANTICIPATE THE ALGORITHM

# The age of the algorithm creates both challenges and opportunities for CMOs.

**87%** agree that "Algorithms are having a bigger and bigger effect on what we see, and what we shop for," rising to **97%** in China and **91%** in India. Yet a vicious circle can emerge where visibility in algorithmic marketplaces is key, but optimizing for the latest memes and moments can create diminishing returns. The algorithm craves novelty, but meme culture, by definition, is repetitive. In effect, brands must run harder than ever to stand still.

Two key data points sum up the CMO's dilemma: **71%** agree "If I don't win with the algorithm, I will be invisible", rising to **80%** in Italy, and **82%** in Spain and Germany. Yet **79%** agree that "Optimizing for the algorithm risks creating a sea of sameness".

The winners will be those who understand at a bone-deep, structural level what drives fandoms and ignites culture, and who have the confidence to engage the few to reach the many.

### HOW STRONGLY DO YOU AGREE WITH THESE STATEMENTS?



87%

AGREE "ALGORITHMS ARE HAVING A BIGGER AND BIGGER EFFECT ON WHAT WE SEE, AND WHAT WE SHOP FOR".

71%

AGREE "IF I DON'T WIN WITH THE ALGORITHM, MY CONTENT WILL BE INVISIBLE".

79%

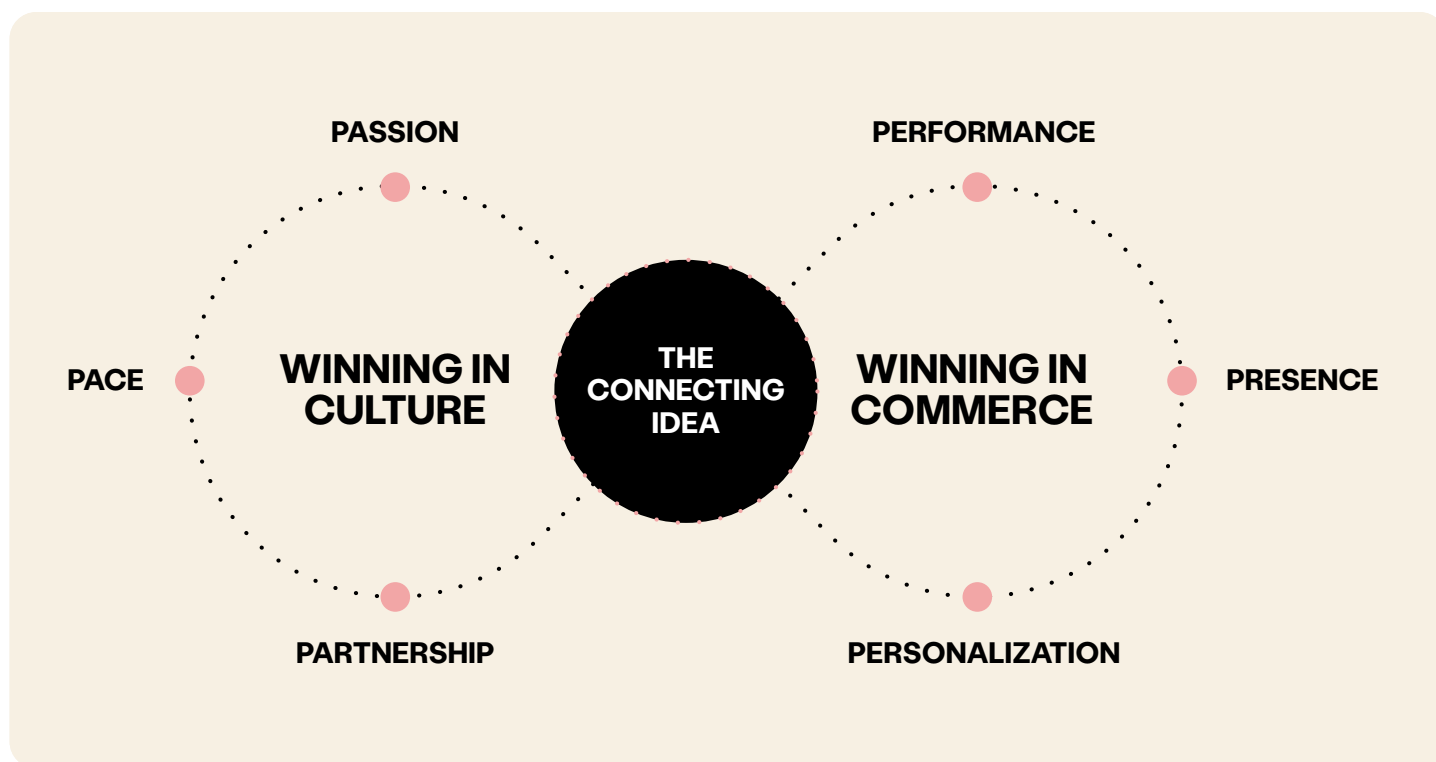
AGREE "OPTIMIZING FOR THE ALGORITHM RISKS CREATING A SEA OF SAMENESS".

To manage this tension, CMOs are turning to cultural, creator and community partnerships in an attempt to lead, not follow, the conversation. Smart brands understand the principles that power the algorithm without simply jumping on the latest meme or moment, and the power of community to drive reach.

Our work for Nutter Butter, for example, taps into the playbook of online fandoms - embracing easter eggs, surrealism, and deep, impenetrable lore - to create its own utterly distinctive brand universe. The campaign successfully generated 3.3BN impressions, and a +16.5% increase in household penetration among the vital Gen Z/Y audience.

The more we automate, the more valuable authentic human insight, distinctive craft and unpredictable creative leaps become.

**AT DENTSU, WE HAVE IDENTIFIED SIX KEY PRINCIPLES TO HELP BRANDS THRIVE IN THE AGE OF THE ALGORITHM:**



**Passion:**

Tapping into cultural passion points and communities of interest.

**Pace:**

Responding with agility to the pace of culture, and the algorithm's hunger for novelty.

**Partnership:**

Engaging with creators and culture-makers.

**Performance:**

Anticipating how every piece of content - brand and demand - will perform with the algorithm.

**Presence:**

Sustaining an always on drumbeat that combines distinctive craft and AI-enabled efficiency.

**Personalization:**

Connecting the customer with the right message in the right moment.



## 02. INVEST IN INTIMACY

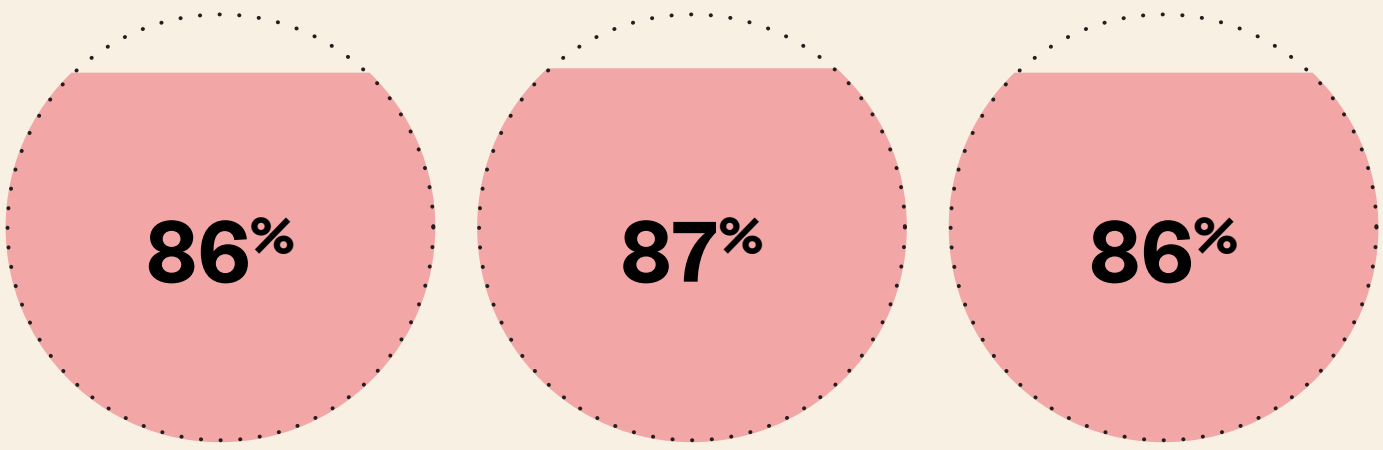
# In a world of big data and large language models, CMOs are returning to intimate, local insight.

The irreplaceable human-to-human insight that helps us feel seen, the niche interests that unlock innovation are more powerful than ever. What scales most effectively isn't necessarily the broadest insight but the freshest and most authentic.

**86%** of CMOs agree that "Hearing from real customers is more important than ever in an AI-driven world", with **41%** agreeing strongly. Overall agreement rises to **94%** in China and **90%** in South Africa. Meanwhile **86%** agree that "Great strategists start with deeply human insights, then find the universal truth", rising to **96%** in China and **95%** in India, and **87%** that "modern strategy will require more creativity, empathy and humanity". **86%** of respondents agree "empathetic human truth will become more important in a world of perfect information" rising to **96%** in China.

Micro human insights - small, individual quirks and observations - are becoming more and more valuable in creating work with edge, heart and uniqueness - which is precisely the work that spreads and scales.

### HOW STRONGLY DO YOU AGREE WITH THESE STATEMENTS?



86%

AGREE "EMPATHETIC HUMAN TRUTH  
WILL BECOME MORE IMPORTANT  
IN A WORLD OF PERFECT  
INFORMATION".

87%


AGREE THAT "MODERN STRATEGY  
WILL REQUIRE MORE CREATIVITY,  
EMPATHY AND HUMANITY".

86%

AGREE THAT "HEARING FROM  
REAL CUSTOMERS IS MORE  
RELEVANT THAN EVER IN  
AN AI DRIVEN WORLD".

AI is undoubtedly an ally in this work, with **54%** of global CMOs using it to predict changes in customer behaviors. Interestingly, however, social listening and monitoring has emerged as the number one strategy for staying ahead of evolving consumer behaviors, embraced by **62%** of CMOs, up 4 percentage points versus 2024. Engaging with fandoms as part of their audience/targeting strategy is the fastest growing source of intelligence on emerging consumer behaviors referenced by CMOs year on year, at **53%**, up 10 percentage points year on year.

Anticipating trends however, is a significant challenge: **89%** of Global CMOs agree that “Being increasingly expected to use data to not only provide insight on consumers today, but also predict future products and propositions” is a challenge for their marketing efforts. CMOs also identify “obtaining the right data to make timely and appropriate decisions (e.g., market intelligence and market signals information)” as the most significant external challenge they expect to face over the next 6-12 months.



Our [Dentsu Creative campaign for Crayola](#), “Campaign for Creativity”, tapped into emotive individual stories to remind the world of the power of creativity. The campaign used social and earned media to reunite adults with their childhood artwork, sparking a national conversation about the importance of creativity and generating over 6B impressions.

HOW ARE YOU STAYING AHEAD OF EVOLVING CONSUMER BEHAVIOR?

	2024	2025
USING GEN Z / C UNITS OR RESEARCH PROGRAMMES	45%	37%
WE ARE ENGAGING WITH FANDOMS AS PART OF OUR AUDIENCE / TARGETING STRATEGY	44%	53% ↑
WE LEVERAGE SOCIAL LISTENING AND MONITORING SO WE CAN IDENTIFY SHIFTS IN SENTIMENT / BEHAVIOR	58%	62% ↑
WE ARE USING AI TO PREDICT CHANGES IN BEHAVIORS	59%	54%
WE ARE INVESTING IN DATA ANALYTICS AND INSIGHTS TO HELP INFORM OUR CREATIVE	65%	61%

### 03. CONNECTING IDEAS

## Today's CMOs overwhelmingly agree that brands today must be co-created.

**91%** of CMOs agree that in the future, brand building will be a partnership between brands, creators and platforms (+14 percentage points year on year). This figure rises to **98%** in China and Australia, and even in markets who are less certain (the UK, France and Brazil) reaches **84%**.

Communities and fandoms are seen as key drivers of scale and engagement in a post-broadcast world.

**87%** of CMOs worldwide agree "engaging communities is a powerful lever to scale brand impact". **88%** agree "I want ideas that start social and community first, rather than advertising ideas activated on social".

"Accessing existing fandoms to harness their power to reach new audiences" is seen as the number one opportunity for brands on social media, while **87%** agree "I am interested in targeting my customers through their passions and communities, not just demographic or purchase behaviors."

**82%** however worry about giving up control amidst the excitement of collaboration and co-creation, up 22 percentage points YOY, while **48%** cited "Difficulty in owning the customer relationship in a world where third parties (e.g., retailers, social & tech platforms, etc.) seem to hold all the power" as one of the top three external challenges they expect to face in the next 6-12 months.

#### HOW STRONGLY DO YOU AGREE WITH THESE STATEMENTS?

BRAND MARKETING WILL BECOME MUCH MORE OF A PARTNERSHIP BETWEEN BRANDS, CREATORS & PLATFORMS

77%

91%

2024

2025

PARTNERING WITH CREATORS & PLATFORMS IS EXCITING BUT I WORRY ABOUT GIVING UP CONTROL

66%

82%

2024

2025

Maintaining control and brand integrity in a world where brands must be co-created or disappear demands a new approach to defining and dimensionalizing brands. **44%** of CMOs agree that a lack of clarity around their brand proposition prevents them from an agile response to an unpredictable environment and is a barrier to success, while **86%** of CMOs agree that “Today’s brands need powerful stories that can be told and passed on by any number of collaborators and co-creators.”

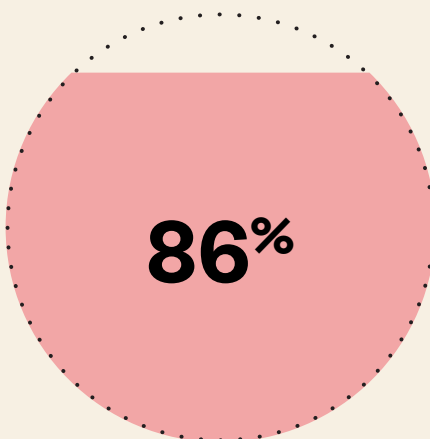
Modern brand architectures must inform and be informed by the conversations a brand is part of, the communities it engages, and the cultural spaces it shows up in.

At Dentsu Creative we call this The Connecting Idea; a brand idea that connects brands to culture, businesses to customers and communities to one another. The Connecting Idea is informed by cultural and community intelligence, with a compelling story at the heart that can be spread and shared. Most importantly, it has powerful behavioral hooks that enable communities, creators and culture makers to co-create the brand story without damaging or diluting it: starting with a point of view not only on what the brand stands for, but who it stands for. Not just brand values, but brand behaviors and associations.



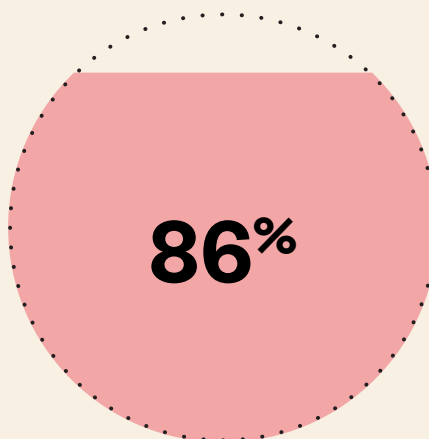
Our long-term partnership with 7-Eleven demonstrates the power of a Connecting Idea, coupled with dynamic cultural intelligence, in action. From the foundation of “Take it to Eleven”, a positioning rooted in understanding exactly how 7-Eleven’s community engages with the brand, we have identified the passion points and partnerships where we can credibly play, and the conversations we have permission to respond to. Giving the brand the right energy to confidently play in fan culture spanning sports, gaming, cars and entertainment in planned and reactive ways.

#### HOW STRONGLY DO YOU AGREE WITH THESE STATEMENTS?



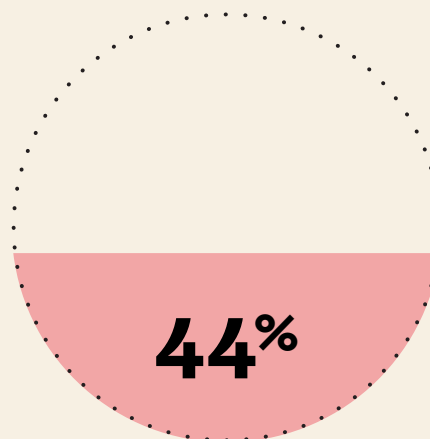
86%

AGREE “TODAY’S BRANDS NEED STORIES THAT CAN BE TOLD AND PASSED ON BY ANY NUMBER OF COLLABORATORS”.



86%

AGREE ON “COMBINING TIMELESS UNDERSTANDING OF AUDIENCES WITH TIMELY UNDERSTANDING OF THE MODERN MEDIA LANDSCAPE”.



44%

AGREE “A LACK OF CLARITY AROUND THEIR BRAND PROPOSITION PREVENTS THEM FROM RESPONDING WITH AGILITY”.

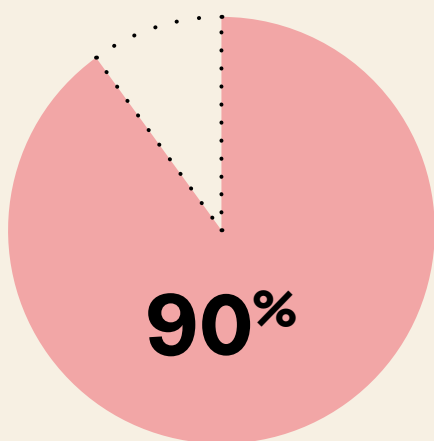
#### 04. INFLUENCE THE OUTCOME

**With such heightened focus on co-creation, it's unsurprising that influencers are a high priority for CMOs in 2025 and beyond.**

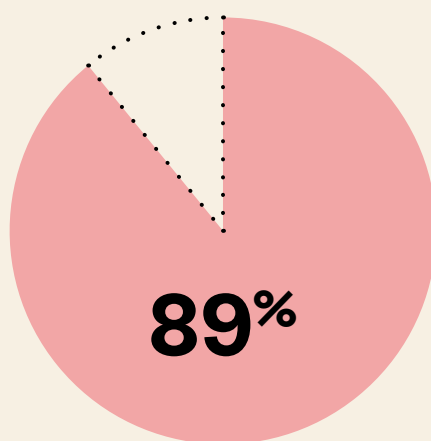
**90%** believe that social and influencer content generates more engagement than traditional advertising, while **89%** believe that real, relatable creators drive better performance than celebrities, rising to **96%** in China, **93%** in the US and **92%** in Canada. **87%** plan to work with a large number of creators/influencers next year, the rise of the micro-influencer running in parallel with the rise of the micro-insight.

CMOs are thinking strategically about the role of influencer content in driving preference within retail media, boosting SEO and ultimately driving visibility with LLMs. **88%** are using influencers to boost visibility within AI-enabled search, while **86%** are using influencers for brand reviews. Interestingly UK CMOs are significantly less likely than their global peers to be using influencers in these ways, although 3 in 4 CMOs still say these technologies form part of their strategy.

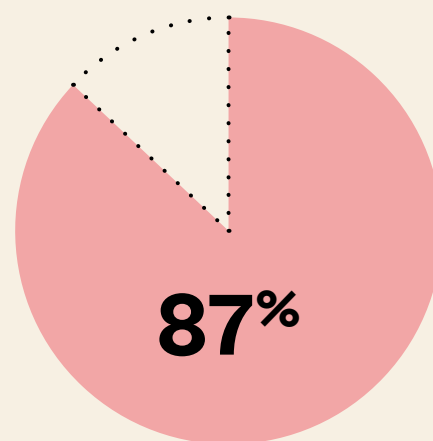
#### HOW STRONGLY DO YOU AGREE WITH THESE STATEMENTS?



BELIEVE THAT "SOCIAL AND INFLUENCER CONTENT GENERATES MORE ENGAGEMENT THAN TRADITIONAL ADVERTISING".



BELIEVE THAT "REAL, RELATABLE CREATORS DRIVE BETTER PERFORMANCE THAN CELEBRITIES".



ARE PLANNING TO WORK WITH A LARGE NUMBER OF CREATORS AND INFLUENCERS NEXT YEAR.

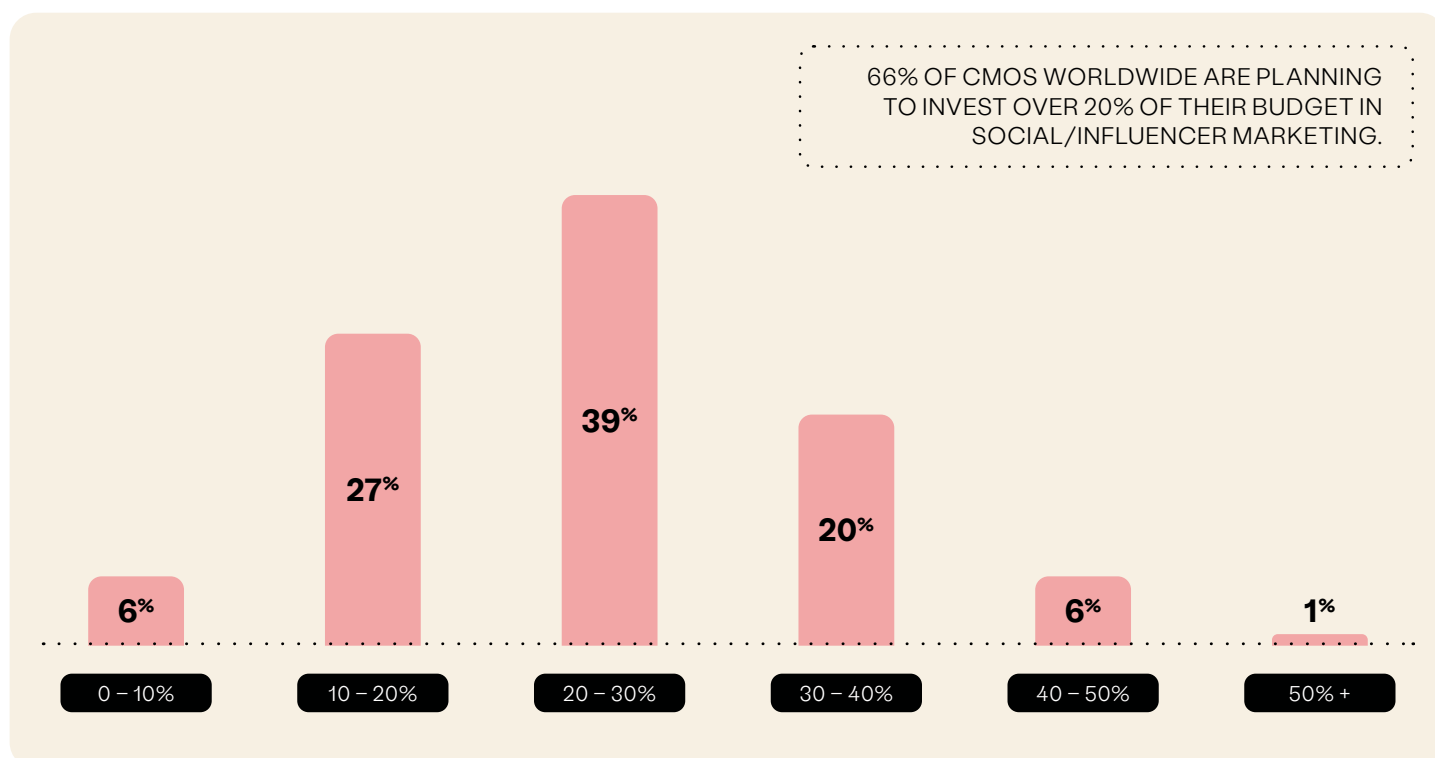
Globally, CMOs are investing in Influencer marketing to differing degrees. **39%** of CMOs worldwide are planning to invest 20-30% of their budget in Social/Influencer Marketing, with **27%** planning to invest over 30%.

**12%** of CMOs in Australia and **10%** in the US are planning to invest over 40% of their budget in Social and Influencer marketing, versus just **5%** in Japan, **3%** in the UK and none in France and South Africa.

Alongside the challenge of brand control, another hurdle for CMOs is the production challenges inherent in creating content for multiple social platforms. **87%** agree "I need bespoke content across all my social channels," creating issues of scale, while **89%** agree "I want a single, integrated production platform for all my brand content, whether agency-led, creator-led or user-generated."

Our latest [Dentsu Attention Economy Research](#) study, in partnership with Lumen, has generated powerful insights on the role of influencer content versus brand led content and the need for a holistic perspective. The study found that influencer-led ads receive up to 73% more attention than brand-led creative (7.3s vs. 4.2s) but that brand-led content was significantly better branded and attributed; highlighting the importance of a holistic approach in line with brand objectives and product maturity.

#### WHAT % OF YOUR BUDGET ARE YOU PLANNING TO INVEST IN SOCIAL/INFLUENCER MARKETING?





## 05. THE CULTURE CONUNDRUM

# Alongside partnering with creators, CMOs agree that brands today are built through Culture.

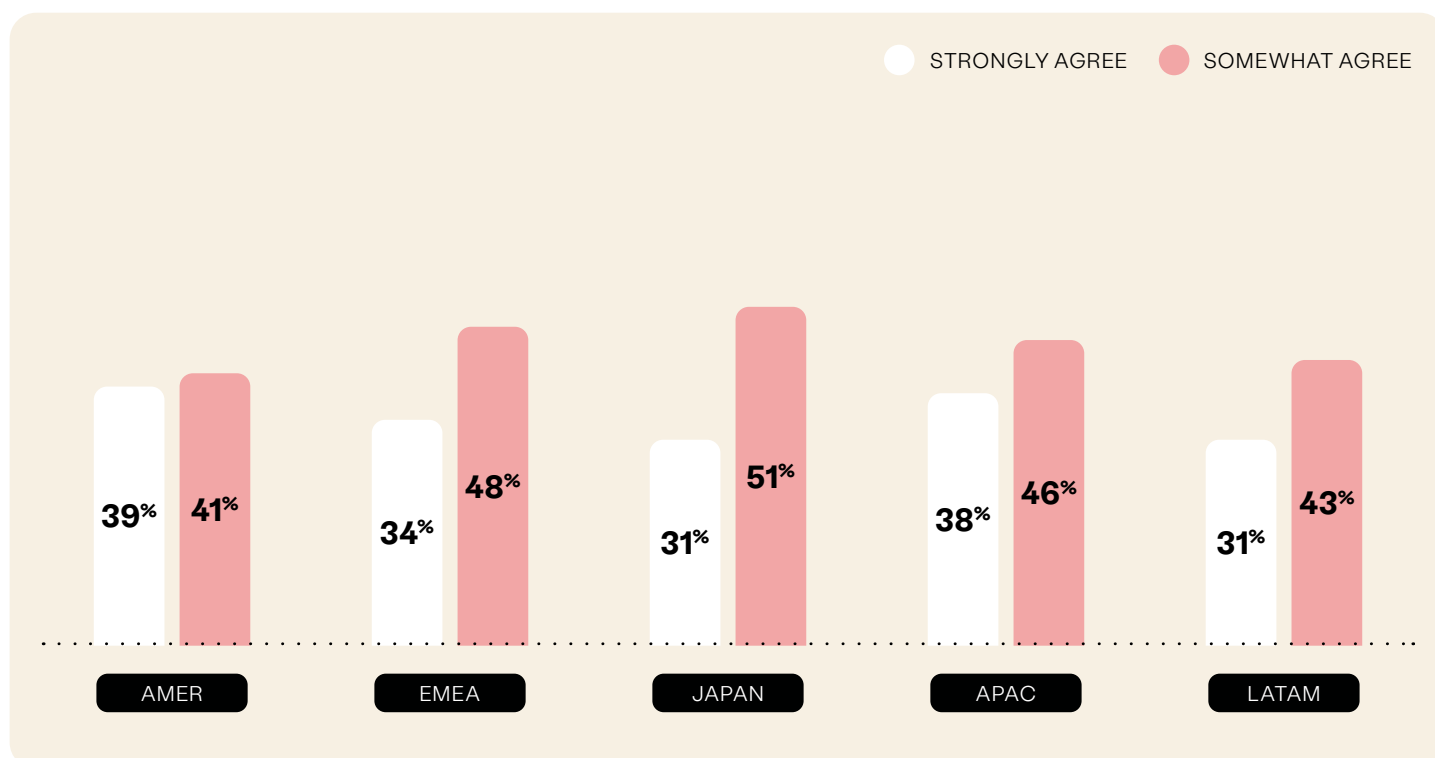
Many are conscious that their tried and tested paid investments may be less impactful with a new generation of consumers.

**84%** agree "I need to win share of culture, not just share of voice," rising to **88%** among B2C marketers, while **70%** agree "My paid media investment isn't working as hard as it used to."

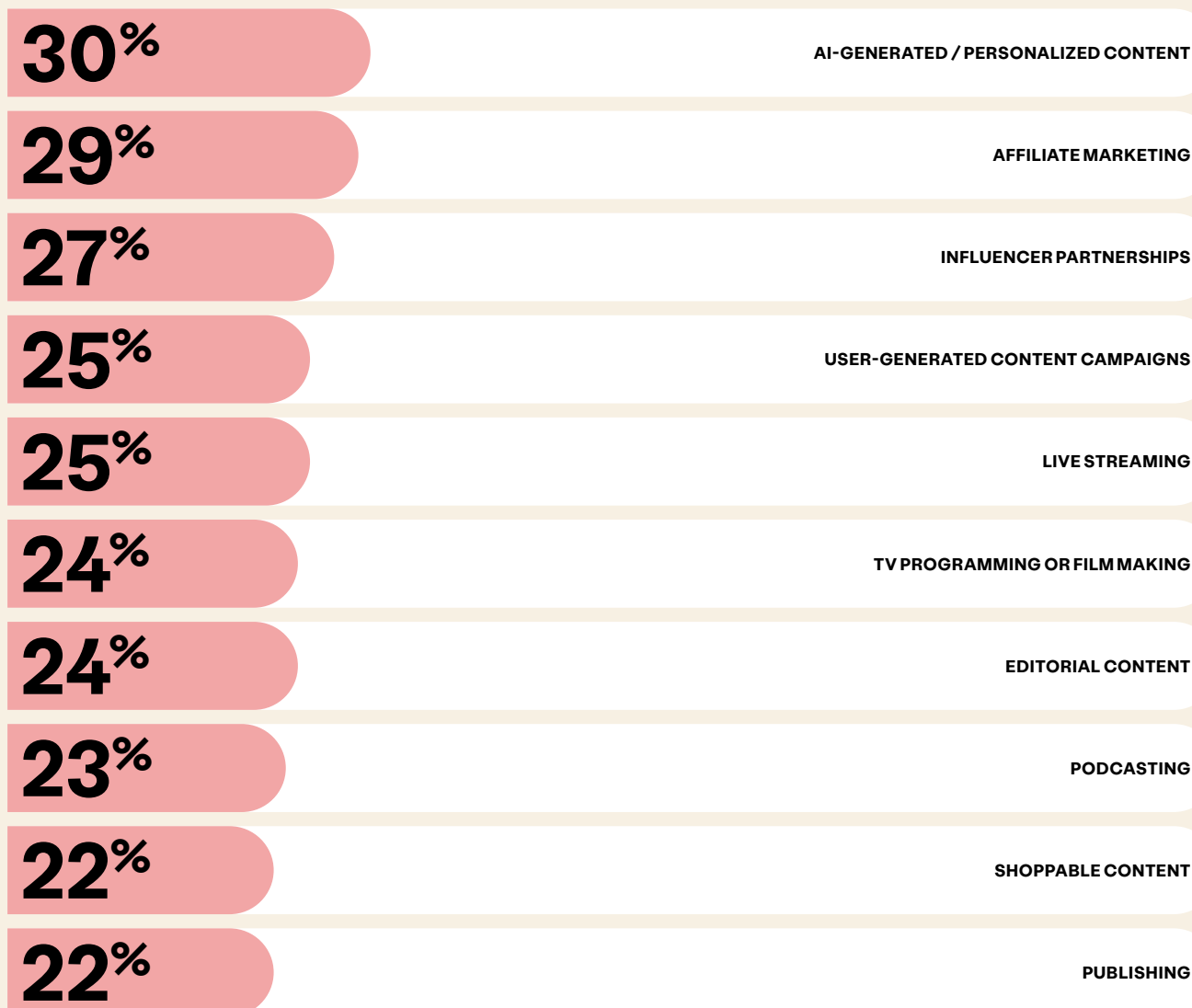
There's no question that the media landscape is changing dramatically. Recent analysis from Ofcom shows that time spent with traditional, live TV has dropped to just 17 minutes a day among 16-24 year olds versus 158 minutes for 55-64 year-olds. YouTube accounts for 13.4% of TV watch time in the US. (Sources: [Ofcom](#), [Nielsen](#)).

The opportunities for brands to build their own platforms and own their own audiences are immense, however, most marketers lack a tried and tested playbook for building brands through culture, particularly at global scale. **81%** of CMOs agree "The future is about building my brand through culture, but there aren't enough tried and tested examples of how to do it," although this figure drops to **74%** in the UK and just **58%** in Mexico.

**'THE FUTURE IS ABOUT BUILDING MY BRAND THROUGH CULTURE, BUT THERE AREN'T ENOUGH TRIED AND TESTED EXAMPLES OF HOW TO DO IT'**



## WHAT MARKETING CONTENT TACTICS HAVE YOU INVESTED IN TO CONNECT WITH CULTURE?



**40%** agree that knowing how or where their brand should credibly connect with culture is a significant challenge for their marketing efforts, and the same percentage agree that responding at the pace of culture is a significant challenge for their marketing team. Cultural agility is a particular challenge for the North American, Australian, French and German markets, while cultural credibility is a particularly acute problem in Germany, South Africa and France.

With a view to building cultural impact, CMOs are investing in a range of strategies and platforms, from sports sponsorships to music partnerships, publishing and programming.

We see significant differences across markets in the channels and platforms identified: France are significantly more likely than other markets to invest in grass roots community building, India in programming and UGC and Mexico in events.

Understanding the fast-changing worlds of culture and entertainment led [Dentsu Creative Iberia to partner with Cristiano Ronaldo](#) on his journey from sports star to media mogul. The UR Cristiano YouTube channel broke 14 world records on the way to over 76 million subscribers.

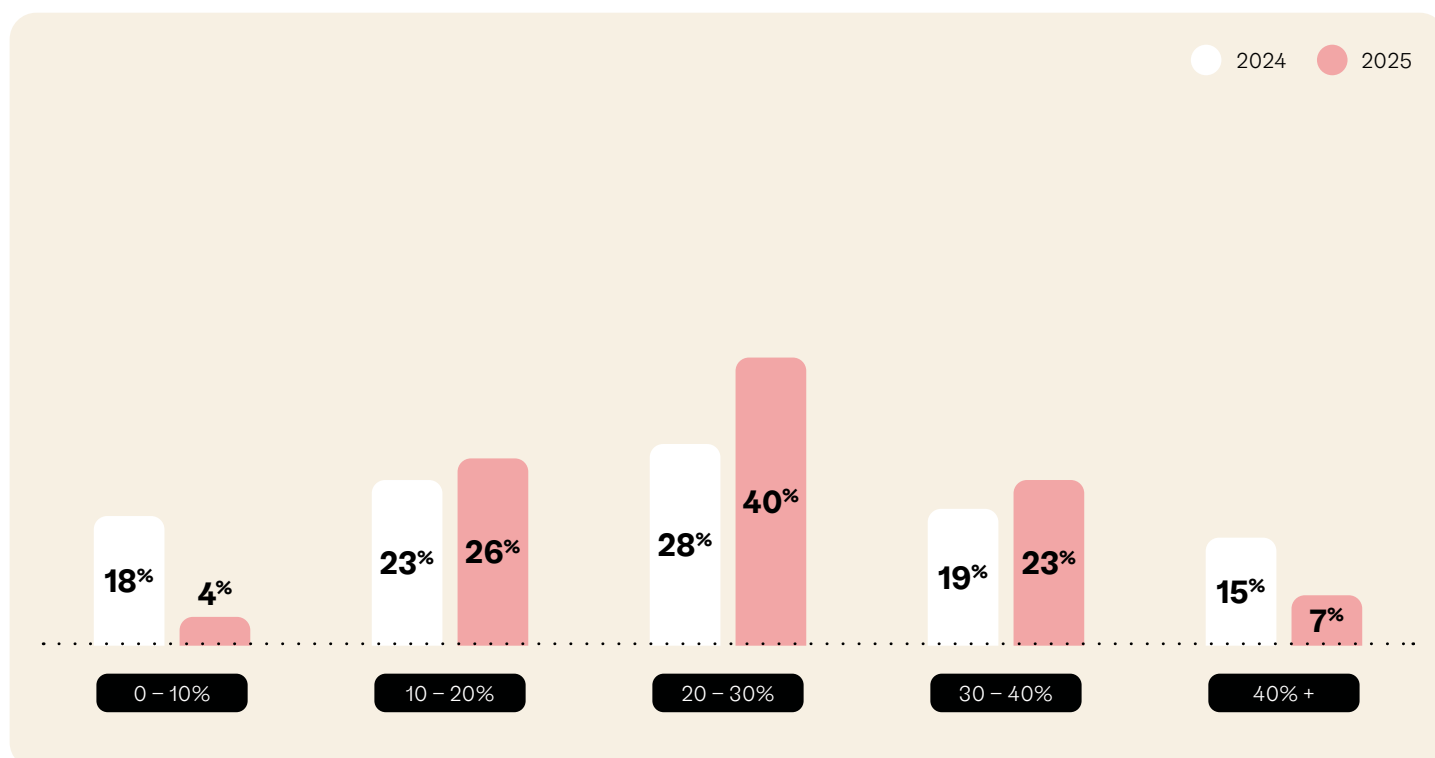
## 06. THE INNOVATION IMPERATIVE

**As tried and tested techniques prove less effective, innovation is no longer a nice-to-have but a must have.**

**70%** of marketers plan to invest over 20% of their budget in innovation in 2025 versus **59%** of marketers in 2024. In a world where the pace of disruption is constantly accelerating, **90%** agree that they want innovation against their most urgent business challenges, not as a side project.

The definition and role of innovation varies across businesses and geographies. For some (**45%**) innovation is about a fundamental transformation of the business model, while for others it is a lighter touch exploration of the possible (**35%**). While **42%** focus on innovation to surprise and delight the customer, **40%** are focused on innovating the operational model and content supply chain. Likewise, the benefits of innovation are felt across the business from talent acquisition to shareholder value.

### WHAT % OF YOUR BUDGET DO YOU PLAN TO INVEST IN INNOVATION GOING FORWARD?



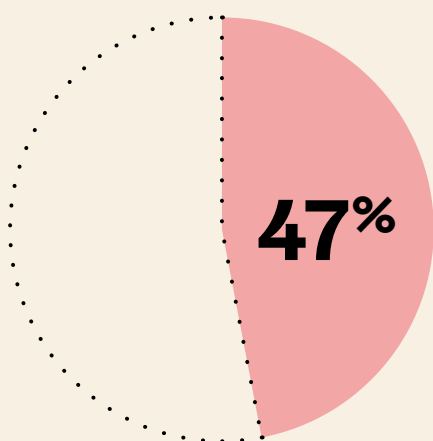
**47%** of global CMOs agree that “innovation that starts with the marketing team can impact the entire business, showing what’s possible” rising to **67%** in India. There is also a recognition that meaningful innovation does not necessarily need to start with product and R&D teams.

In terms of the technologies CMOs are investing in to accelerate innovation, social commerce, chat and personalization technologies are widely adopted, with gaming, voice and AR/VR on their agenda for future investment.

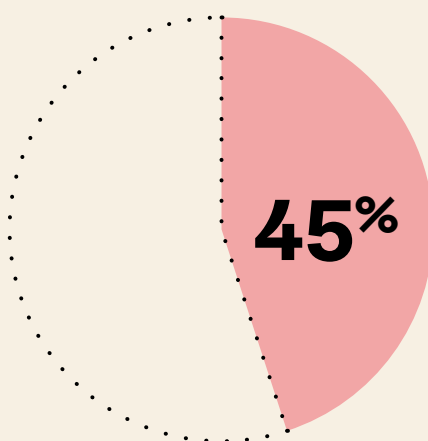


Our [Dentsu Lab](#) innovation accelerator, founded in Tokyo in 2014 is rapidly expanding across the globe, blending R&D methodologies with craft and creativity to help our clients unlock new value.

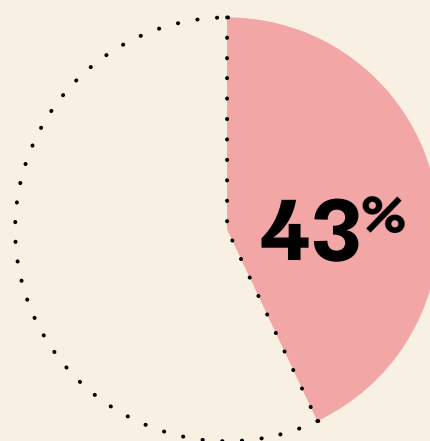
#### HOW STRONGLY DO YOU AGREE WITH THESE STATEMENTS?



"INNOVATION THAT STARTS WITH THE MARKETING TEAM CAN IMPACT THE ENTIRE BUSINESS, SHOWING WHAT'S POSSIBLE".



"INNOVATION MEANS FUNDAMENTALLY TRANSFORMING OUR BUSINESS FOR THE FUTURE".



"INNOVATION HAS A POWERFUL IMPACT ON MY SHARE PRICE OF BRAND VALUATION".

## 07. ARTIFICIAL ASSISTANCE

# AI has quickly become integral to CMOs' personal working habits.

Almost all of today's CMOs are using AI in their personal workflows to summarize research, draft copy and challenge their thinking, with over **30%** using it daily. This fuels a desire for transparency around agency workflows, and new conversations on agency pricing models: **88%** believe AI will transform agency pricing models, while the same proportion want to see full transparency on how AI is being used across agency workflows.

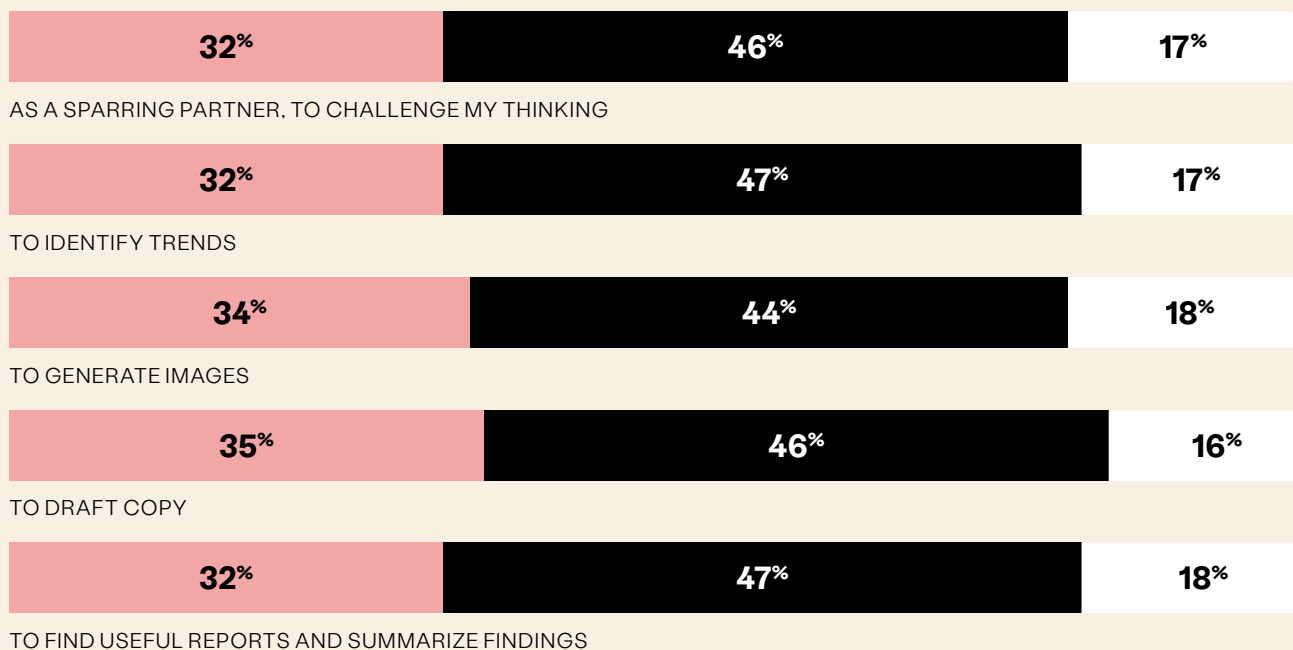
Nevertheless, CMOs remain committed to the power of humanity. **86%** believe AI should give talented individuals superpowers, not replace them, rising to **92%** in APAC but dropping to **76%** and **70%** in Italy and France respectively (still a strong majority).

**88%** of marketers agree smart agencies will move quickly beyond using AI to drive efficiency, towards using AI to drive impact and effectiveness – rising to **94%** in APAC and **98%** in China and India.

Intriguingly, CMOs' attitudes to the role of AI versus human craft shows significant volatility year on year. **78%** believe "Generative AI will never replace the human imagination" in 2025 (up 13 percentage points from 65% in 2024), while **68%** believe "Generative AI will never be able to create content that moves people" (up 19 percentage points from 49% in 2024).

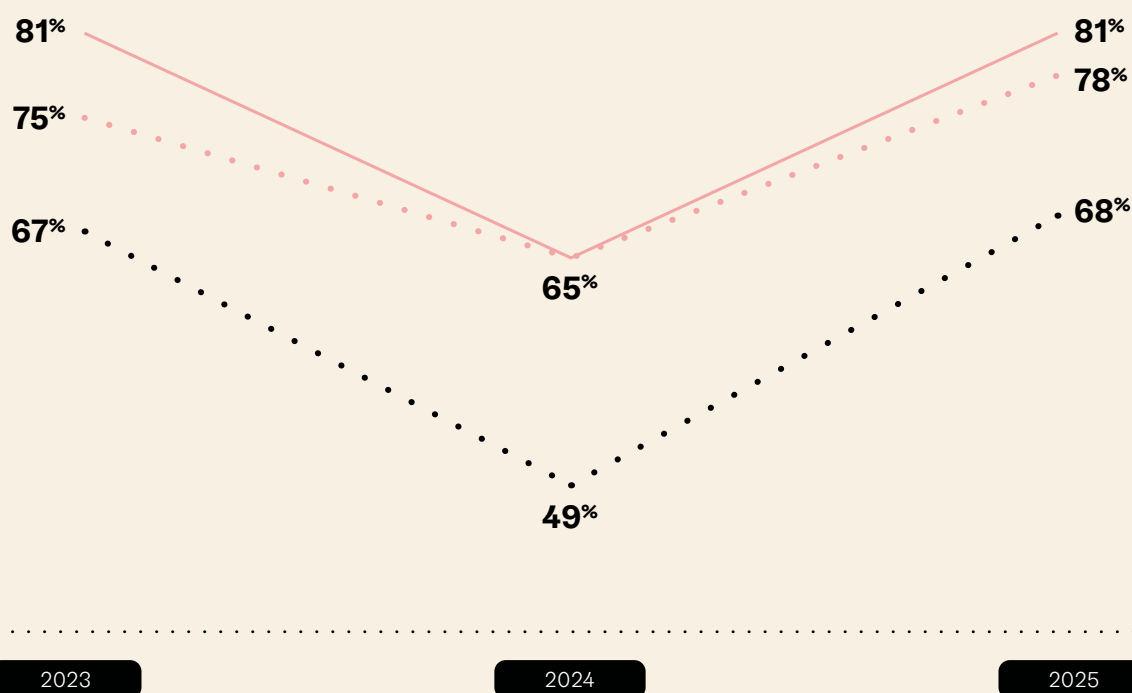
● DAILY ● WEEKLY ● MONTHLY

### A MAJORITY OF CMOs ARE USING AI ON A WEEKLY, OR EVEN DAILY BASIS



## HOW STRONGLY DO YOU AGREE WITH THESE STATEMENTS?

- MY CUSTOMERS WILL PAY A PREMIUM FOR HUMAN-CREATED CONTENT
- ... GENERATIVE AI WILL NOT BE ABLE TO CREATE ADS THAT MOVE PEOPLE
- ... GENERATIVE AI WILL NEVER REPLACE THE HUMAN IMAGINATION



The 2024 data represented a significant decline on these measures vs 2023's findings as adoption of Generative AI became more widespread but we are seeing a rebound in the belief that humanity is key to creating content that moves us and imagines new possibilities. Similarly, **81%** of CMOs believe their customers will pay a premium for human-created products and services, rising to **85%** in the North America region, **89%** in China and dipping considerably to **65%** in the LATAM region. Globally, this represents a 16 percentage point uplift on 2024, returning to 2023 levels.

What do these movements mean? It's hard to fully explain, other than that in such a fast moving and emotive space, attitudes change quickly. In 2023, the technology was at a point where it was impressive, but the bugs were often still apparent. By 2024 we had reached enterprise quality imagery and CMOs had much more clarity on what was technically possible. Yet somehow by 2025, amidst infinitely slicker demos and extraordinary leaps forward in AI-enabled imagery, marketers are questioning whether the output connects on a human level.

It will be fascinating to see how quickly these trends evolve and whether the "uncanny valley" will remain an issue.

Perhaps this emotional delta is one reason why CMOs today are most comfortable with AI as a driver of speed and cost efficiency while they wrestle with its role in craft and ideation: **89%** agree "Gen AI will make a massive difference to my ability to produce assets cheaply and quickly", **90%** agree "Gen AI will make it much easier for me to in-house a lot of my marketing" and **91%** agree "Gen AI will mean I can use my agency for ideation but use AI for lots of the adaptation and transcreation work".

However, almost 2/3 of CMOs (**65%**) feel that AI-assisted creativity cannot yet capture the tone of voice, look and feel of their brand, a sentiment that rises to **84%** in Italy and falls to **37%** in India, one of the most polarizing sentiments in the study from a market perspective.



## 08. HUMAN EXPERIENCE

# It is hard to imagine today what our digital interfaces will look like even a few years from now.

In a world where agents may disintermediate many of our shopping and browsing experiences, where the search experience will be vastly different, and where conversational commerce and retail media are expanding.

Which is perhaps why **86%** of CMOs agree that “Brands today are built through experiences” yet **73%** worry that “AI is at risk of making my brand experience less impactful.” On the flipside, **90%** agree that “Gen AI will help us design more helpful, personalized and dynamic experiences.”

Many commentators have (prematurely) declared the death of the website and of SEO (**89%** of our CMOs agreed that “AI will transform the future of search”) and there is no question that both will evolve significantly. Many sites are already reporting significant declines in traffic since Google’s introduction of AI search summaries. But perhaps the role of the site isn’t dying, but evolving to solve less for information and discovery and more for high value, highly personalized interactions such as product configuration and customization, virtual try on, and personalized recommendations.

### HOW STRONGLY DO YOU AGREE WITH THESE STATEMENTS?

**89%**

AGREE “EVERY BRAND TOUCHPOINT SHOULD TELL THE BRAND STORY, FROM COMMS THROUGH TO COMMERCE”.

**73%**

AGREE “AI IS AT RISK OF MAKING MY BRAND EXPERIENCE LESS IMPACTFUL”.

**90%**

AGREE “GEN AI WILL HELP US DESIGN MORE HELPFUL, PERSONALIZED AND DYNAMIC EXPERIENCES”.

Authoritative, well-structured content that surfaces within LLMs will remain key for driving share of model and visibility off site, but the on-site experience may shift to be more action-oriented, which will place greater emphasis once again on digital craft. This raises the possibility that in the future web design will be a game of two halves; one by machines for machines and one by humans, augmented by machines, to deliver very human experiences.

Brand experience will clearly play an important role in sustaining brand preference and establishing brands as trusted curators and navigators. **89%** of CMOs agree “Every touchpoint should tell the brand story, from comms to commerce” (up 14 percentage points from **75%** in 2024) yet **72%** believe not enough brand experiences are distinctive.

Intelligent personalization and innovative interfaces such as gaming, virtual worlds, gesture and touch are seen as key to delivering creative brand experience, sustaining their importance year on year, and rated as key ingredients by **54%** and **56%** of CMOs respectively. Meanwhile CMOs plan to use techniques such as immersive AR/VR experiences (**49%**), integration in gaming (**51%**) and integration into livestreaming (**44%**) to innovate around the customer experience.

WHAT ARE THE KEY INGREDIENTS OF GREAT CREATIVE BRAND EXPERIENCES?

	2023	2024	2025
TECHNOLOGY THAT ENHANCES THE CREATIVE IDEA	48%	66%	55%
INTELLIGENT PERSONALIZATION TO SURPRISE AND DELIGHT	43%	56%	54%
NEW INTERFACES SUCH AS GAMING, VIRTUAL WORLDS & TOUCH	48%	51%	56% ↑
A POWERFUL CONNECTING IDEA	43%	51%	50%

## 09. INTELLIGENT CONTENT

# Content and experience of course go hand in hand in shaping the customer experience.

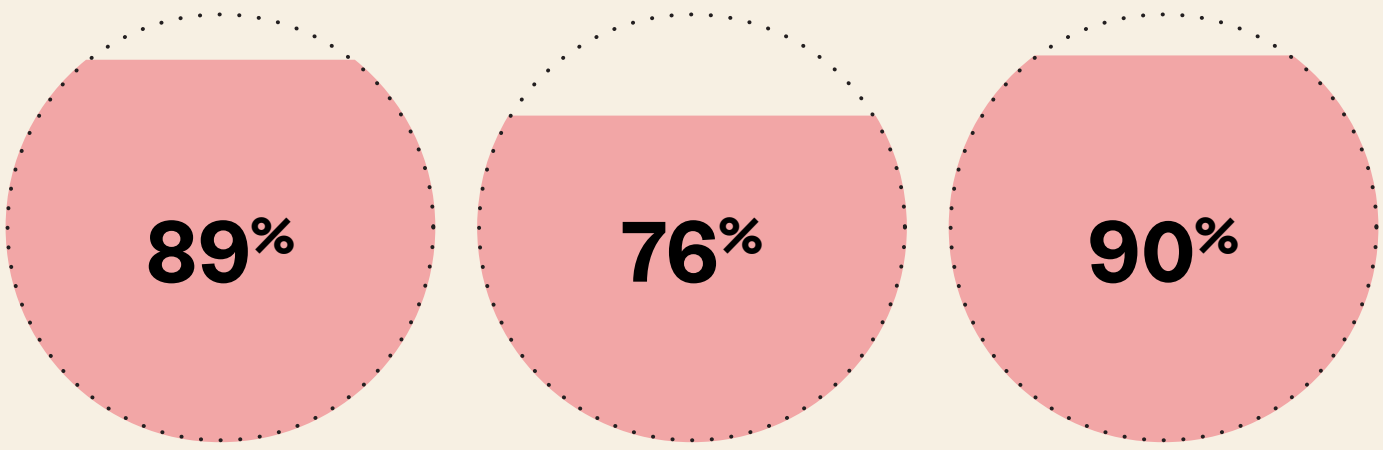
For many years, an inability to scale and personalize content at pace acted as a handbrake on delivering on the brand experience we might have imagined. But as production and personalization capabilities leap forward, clients are thinking in a more strategic and considered way about the role of content in driving discoverability and accelerating the customer journey.

Many are moving beyond thinking about scale and towards thinking about intelligent content, optimized against real time understanding of the customer journey. Over half of all CMOs surveyed reported they are already using AI to personalize experiences and tailor messaging and content, although **40%** of CMOs cite "delivering personalized marketing / content at scale" as a significant challenge to their marketing efforts.

They know they will need to make significantly more, and different, content going forward. **87%** agree "My business will need to produce far more content going forward" while the same percentage agree that they need bespoke content across individual social platforms.

There are some fundamentals they need to put in place, to help them avoid duplication, streamline their organization, and drive global consistency and efficiencies. **89%** agree that "It is important for my content to be produced at scale, seamlessly, across multiple channels and territories" with the same proportion agreeing that "Transcreation, localization and market relevance are key to my marketing activities".

### HOW STRONGLY DO YOU AGREE WITH THESE STATEMENTS?



89%

AGREE THAT "REAL TIME CONTENT PERSONALIZATION HELPS TO DRIVE GROWTH".

76%

AGREE "I HAVE THE DATA TO BE ABLE TO PERSONALIZE MY MESSAGING, BUT CAN'T PRODUCE THE NUMBER OF ASSETS I NEED".

90%

AGREE "I WANT TO COMBINE AGILE PRODUCTION WITH INTELLIGENT DATA TO MEET THE RIGHT CUSTOMER WITH THE RIGHT MESSAGE IN THE RIGHT MOMENT".

As discussed above, they are convinced that AI will reduce time and cost to market, with **89%** believing that AI will make adaptation and transcreation easier, faster and more cost effective than it is today. However, many of today's CMOs are moving quickly beyond "more content" to "more intelligent content." **90%** agree "I want to combine agile production with intelligent data to meet the right customer with the right message in the right moment".

They believe craft remains vital in a world where a sea of sameness and "slop" can all too easily arise. **88%** agree that "Craft and design matter more than ever in a world of AI-assisted production", while **90%** agree that craft and design are vital for ensuring brands remains distinctive, rising to **98%** in China.

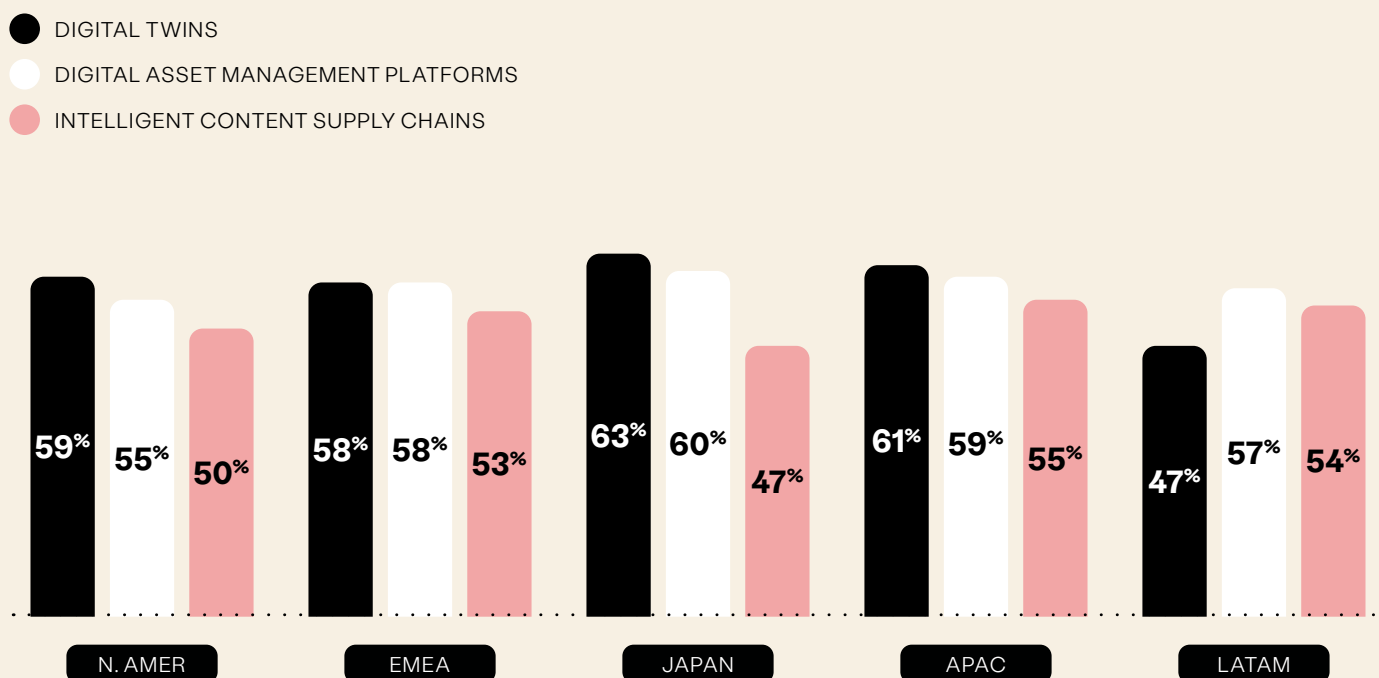
In this context, CMOs need production partners who can support not only their content strategy but their customer experience and acquisition strategy, as well as helping them drive organizational change. **90%** believe they need a strategic production partner who understands the role of content across the customer journey while **91%** agree "I need a marketing technology transformation partner who can help me with organizational change, not just the tools I use but my processes and ways of working."

Many are recognizing that integrating data, creativity, production and media is vital if they are to deliver on the possibilities of the modern media landscape. **89%** agree that real-time content personalization helps to drive growth, rising to **96%** in China.

However, **76%** agree that "I have the data to be able to personalize my messaging, but can't produce the number of assets I need" while **77%** believe that siloed agency models separating creative, media, data and production mean their content isn't working as hard as it could be.

At Dentsu Creative, we have a number of solutions in place to help clients ensure their content scales and connects. In partnership with Adobe, we have created a proprietary content supply chain solution, Adobe GenStudio dentsu+, which combines the power of the Adobe stack with our proprietary dentsu data and technology stack, and bespoke AI-enabled production capabilities from Tag to ensure content isn't simply created at scale, it connects at scale to accelerate our clients' growth.

#### WHICH OF THE FOLLOWING TECHNOLOGIES ARE YOU USING IN YOUR CONTENT PRODUCTION SYSTEM?



## 10. IN TASTE WE TRUST

# CMOs believe Agentic AI will have a profound impact on their business.

CMOs in China and the US anticipate particularly strong impacts, as well as those in the service industries. Globally **89%** agree "Agentic AI will have a significant effect on my business" while **90%** agree "Agentic AI will have the biggest impact on service industries like travel, utilities and entertainment".

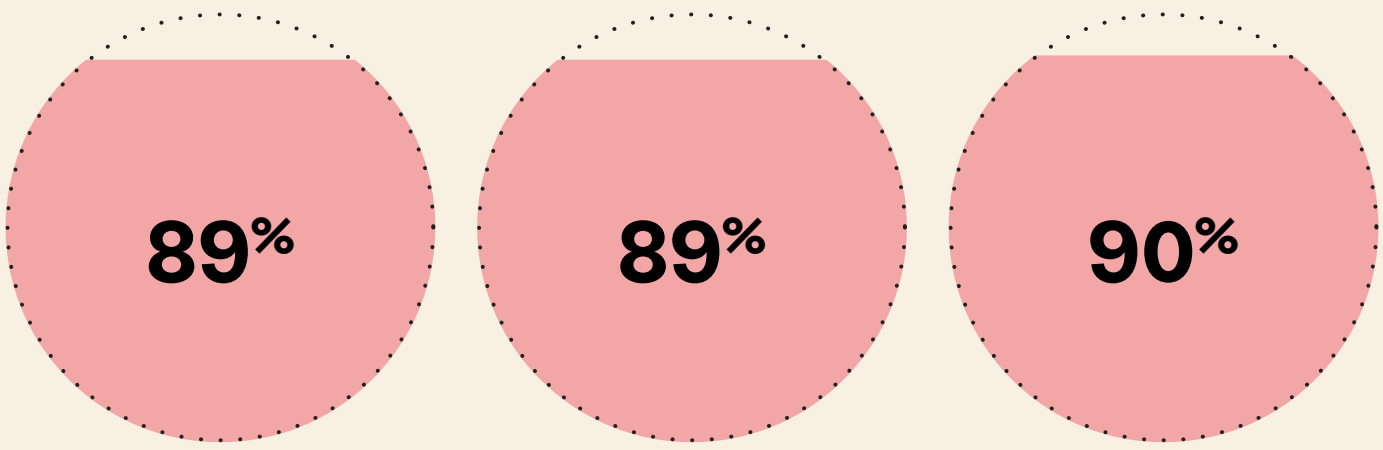
However **89%** agree "Trust and taste matter more than ever in the world of Agentic AI" and **90%** that strong brand preference will be vital in an Agentic world if brands are to retain their place in the shopping basket.

A world where we rely on agents to book travel, choose restaurants or shop for gifts will require high levels of trust; not only in terms of payment and privacy but also trust that the agent understands my tastes and preferences. Who we trust to delegate our purchases and bookings to will be a fascinating test of established brand affinities versus the intimacy people are rapidly establishing with their AI platform of choice.

Who, for example, do I trust to curate a holiday itinerary for me, booking flights, hotels and transfers? A trusted airline brand, a travel publisher, a search engine, a travel influencer or the chatbot I have been using for therapy, recipe suggestions and health advice? Likewise, a world of infinite content will place an even greater premium on curators and editors to help us navigate. Transparency around the sources used to train models and respond to specific queries - from academic publications to the open web - will be key.

Indeed, trust overall remains one of the greatest challenges marketers face: over half (**52%**) cited "Building trust with consumers in an era of misinformation" as one of the biggest issues in the way of achieving their business objectives, rising to **72%** in India and dropping to **34%** in China. Therefore it's perhaps no surprise that **88%** of marketers agree that "Marketers often underestimate the power of emotion in driving transformational growth."

### HOW STRONGLY DO YOU AGREE WITH THESE STATEMENTS?



89%

AGREE "AGENTIC AI WILL HAVE A SIGNIFICANT EFFECT ON MY BUSINESS".

89%

AGREE "TRUST AND TASTE WILL MATTER MORE THAN EVER IN A WORLD OF AGENTIC AI".

90%

AGREE "STRONG BRAND PREFERENCE WILL MATTER MORE THAN EVER IN A WORLD OF AGENTIC AI".

## 7 SUMMARY AND CONCLUSIONS

# So what do these findings mean for CMOs in 2025 and beyond?

It is clear that three seismic shifts are transforming the industry, at pace. The exponential acceleration of AI. Creators and communities coming of age. The shift towards algorithmic marketplaces and away from live and linear viewing. Some CMOs undoubtedly feel caught between traditional models which are no longer as effective as they once were and new models that feel untried and untested.

Yet as daunting as change can feel, it can start in surprisingly small ways. As we race to embed AI in our processes and workflows, we must also make time to champion micro-insights, to engage fandoms and communities, to immerse ourselves in cultural rabbit holes.

There are huge implications for our data and technology stacks of course. Investment in modern, data-driven and AI-enabled content supply chains will be vital. Understanding how to optimize for agents will be key. What can be automated, will be automated and the race is on to make our systems and structures fit for purpose.

Which means, paradoxically, that what can't be automated will be more valuable than ever. This is not a question of blinkered optimism, but the inevitable consequence of algorithmic marketplaces and AI-assisted production. AI is trained on historical data to create the most likely, and predictable response. Yet creativity, taste and culture are inherently unpredictable and individual.

We have designed a system that craves novelty but tends towards repetition and sameness: in targeting, in theme, in execution. The result is that originality is harder to find, but disproportionately rewarded when it surfaces. Which means that by luck rather than design we have created an extraordinary machine that is highly dependent on brilliant humans to avoid creating a self-defeating stream of sameness.

But now is the moment to design intentionally for the future we want to see. One that embraces our new reality but plans to make it work for people, businesses and society. So how do we do it?

Winning with the algorithm will mean being both brilliantly automated and brilliantly human. Bringing the two threads together will work harder still, augmenting humanity and humanizing technology.



# THANK YOU

## METHODOLOGY

A 15-minute online survey was designed by dentsu, and was scripted, hosted and monitored by B2B International, a dentsu company specialized in market research studies. Fieldwork took place in April 2025, surveying 1,950 global respondents. We spoke to 1,950 senior marketing decision makers across 14 markets in a range of sectors and with representation from companies in the Enterprise (1,000+ employees), Large (251-1,000 employees), and SMB (50-250 employees) categories. The objective was to explore the role of creativity and the creative experience among senior marketing professionals across Australia, Brazil, Canada, China, France, Germany, India, Italy, Japan, Mexico, South Africa, Spain, the United States, and the United Kingdom.

## ABOUT DENTSU CREATIVE

Dentsu Creative is a global creative agency network designed to unlock exponential growth for clients. We use Transformative Creativity as a differentiating, driving force to bring our capabilities together to positively impact people, business and society.

Established in June 2022, Dentsu Creative is integrated with dentsu's Media and CXM businesses in over 145 countries and regions, to offer Integrated Growth Solutions.

## ABOUT DENTSU CMO NAVIGATOR

Dentsu's CMO Navigator series is a global thought-leadership platform that provides insights from marketing leaders around the world on their evolving remit, priorities and challenges.

This report offers a perspective on global CMOs' mindsets and priorities when it comes to creativity. Later in the year, this report will be followed by two additional CMO Navigator releases, focused on media transformation and customer experience transformation respectively.

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