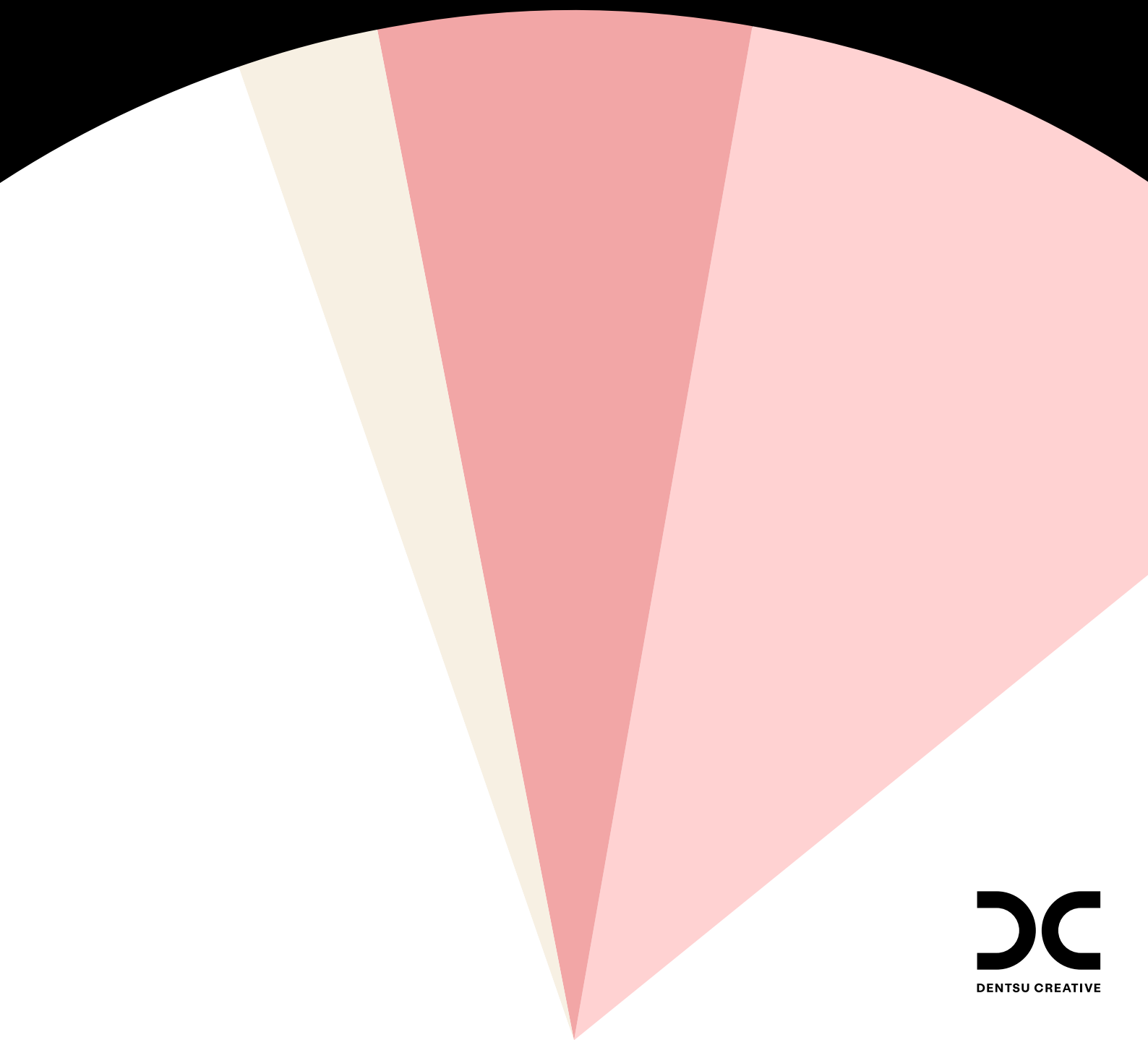


DENTSU CREATIVE 2026 CMO REPORT

MAKING IT REAL

How CMOs are connecting brand, systems and
technology to deliver lasting impact in market



MAKING THE BRAND PROMISE A REALITY

IN 2026, MARKETERS ARE PRIORITIZING REAL IMPACT OVER HEIGHTENED EXPECTATIONS.

As marketers, we prize vision. Inspiring images of what's next, of where ideas and technology could take us. Our reach, as the poet Robert Browning says, often exceeds our grasp. Which is, most of the time, a good and healthy thing.

Yet in a world where possibilities are expanding at exponential pace, and it is harder every day to tell vision, hallucination or vaporware from reality, we see marketers crying out for a reality check.

Human truth commands a premium. Human craft is the source code that underpins (or undermines) our investment in sophisticated AI-enabled systems. Marketers are planning to make significant investments in real-world touchpoints from posters to packaging as moments of shared truth, fixed points in an ever-shifting algorithmic ecosystem. In parallel, they are increasingly drawn to community intelligence and micro-influencers.

Having been sold a vision for how AI will transform their businesses, they now expect real results, and value real experiences. As technology matures and adoption increases, we see a moment of reflection, where marketers are reappraising their investments and expectations.

We also see CMOs wrestling with the emotional and reputational realities of an agentic world: technology may make it possible to outsource or automate key tasks, but our personal comfort levels lag behind.



YASU SASAKI

Global Chief Creative Officer, dentsu



TODAY'S CMOS WANT TO USE TECHNOLOGY TO CRAFT MORE HUMAN EXPERIENCES. THEY RECOGNIZE THAT THE TRUE POTENTIAL OF AI IS NOT JUST MORE ASSETS, BUT MORE IMPACT. THEIR ASK FOR 2027 AND BEYOND IS SIMPLE: MAKE IT REAL. MAKE THE PROMISE OF AI REAL BY INTEGRATING BRAND, TECHNOLOGY, AND OPERATING SYSTEMS. CRAFT MORE HUMAN EXPERIENCES, BOTH BY REINVESTING IN REAL-WORLD TOUCHPOINTS AND BY CONNECTING DATA, PRODUCTION AND MEDIA TO DELIVER THE RIGHT EXPERIENCE IN THE RIGHT MOMENT. IN A WORLD WHERE AI MAKES GOOD WORK EASIER, INVEST IN THE TALENT AND INDIVIDUALITY THAT MAKE EXCEPTIONAL CREATIVE WORK POSSIBLE."

INTRODUCTION

As we reach beyond the initial hype cycle, making the promise of AI real means rethinking how our technology stack meets our organizational design to enable our brand vision. Which means bringing brand strategists, systems thinkers and engineers together as never before. There is no shortage of vision in the AI space - some dystopian, some ecstatic - but for CMOs it is time to bring the vision into sharper focus. To ask not just where we want to go but how, exactly, we are going to get there. No small challenge in a world where technology is moving faster than traditional roadmaps can keep pace.

Smart businesses will also pause to ask why we are racing so hard to get there. If everything were to go right, in terms of technology, culture, and adoption, what would the future look like, for people, business, and society? Balancing vision and reality will require new levels of organizational agility and ability to think both in the now and in the next. CMOs are asking for small, tangible wins and for meaningful innovation. For visionary thinkers with their feet firmly planted in the reality of their business, delivering progress rather than striving for perfection.



PATRICIA MCDONALD

Global Chief Strategy Officer
Dentsu Creative



FOR THE LAST FEW YEARS, THE INDUSTRY HAS BEEN PREOCCUPIED BY SCALE, CONSOLIDATION AND EFFICIENCY. WHAT WE SEE NOW IS A DIFFERENT CONVERSATION EMERGING: NOT HOW WE CAN SCALE FOR SAMENESS, BUT HOW WE CAN VERY INTENTIONALLY DESIGN FOR DIFFERENCE. THAT STARTS WITH A VERY DIFFERENT APPROACH TO BRAND DESIGN AND DEFINITION: NOT JUST BIG IDEAS BUT CATALYZING IDEAS. IDEAS THAT SHAPE NOT ONLY THE CUSTOMER-FACING EXPRESSION OF THE BRAND BUT INTERNAL SYSTEMS, TECHNOLOGY AND ORG DESIGN, MAKING THE BRAND PROMISE REAL AND DISTINCTIVE AT EVERY TOUCHPOINT. OUR ROLE AT DENTSU IS TO HELP CLIENTS CLOSE THE GAP BETWEEN INVESTMENT AND IMPACT IN MARKET, ENSURING THEIR TECHNOLOGY STACK IS MEASURED NOT JUST IN VOLUME OF ASSETS BUT IN VALUE OF CONNECTIONS.”

THIS REPORT UNPACKS 10 KEY THEMES SHAPING THE FUTURE OF MARKETING AS CMOS GET REAL.

01. FROM POTENTIAL TO PROOF

CMOs remain optimistic about AI, but greater understanding of the cultural and operational changes required is recalibrating expectations. Many still hesitate to delegate tasks to agents due to security or reputational concerns.

02. FROM ASSETS TO IMPACT

CMOs are moving from efficiency to effectiveness. Focus is rapidly shifting from the volume of assets created to the value of connections made, with AI leveraged to enable greater relevance and responsiveness.

03. DESIGNING FOR DIFFERENCE

As algorithmic feeds and automated content accelerate sameness, leading brands are investing in difference as an operating system, embedded deep in tools, technology and workflows.

04. SPIKY THINKING

As brands are increasingly built in partnership with creators and communities, big ideas are not enough. Brands today need Catalyzing Ideas, designed to evolve, spread and spark collaboration inside the business and beyond.

05. TRANSFORMATIVE CANVASES

CMOs know brands today are built through culture, but many lack a proven playbook. While enthusiasm is high, credibility, measurement and strategic alignment remain key challenges.

06. CONTEXT COMPOUNDS

Brands are firm believers in the power of context as a force multiplier. Connecting the right audience with the right experience at the right moment is one way we can leverage AI to tell more human stories.

07. ONLY HUMAN

As automation grows, human intuition, empathy, and craft become more valuable. CMOs are investing in these skills, while looking to fandoms and communities for distinctive and authentic insight.

08. THE SCALE OF SMALL

Brands are turning to networks of micro-influencers to spread ideas with authenticity and manage their visibility with LLMs. Big ideas built through smaller voices aim to resonate with the audience, the algorithm, and the agent.

09. SEEING IS BELIEVING

Marketers plan to increase investment in out-of-home, packaging, events and experiences as consumers seek analog moments and shared experiences in an algorithmic world.

10. PRACTICAL MAGIC

As innovation becomes a business imperative, clients are shifting from the “shiny object” approach towards solutions that tackle operational challenges and unlock business transformation.

FROM POTENTIAL TO PROOF

WHILE CMOs REMAIN BULLISH ON AI FOR THE MOST PART, THERE IS A SENSE THAT THEIR ENTHUSIASM IS NOW INFORMED BY INCREASED UNDERSTANDING OF THE CULTURAL, OPERATIONAL AND ORGANIZATIONAL CHANGES INVOLVED IN UNLOCKING MEANINGFUL IMPACT ACROSS THE ORGANIZATION.

This is in part, no doubt, due to a more mature understanding of the technology but there is also a sense that AI has not delivered the overnight efficiencies some expected. We saw a significant decline in statements like “Gen AI will make a massive difference to my ability to create assets quickly and cheaply” (dropping 7 percentage points YoY) and “Gen AI will make it much easier to in-house a lot of my marketing” as the people-powered labor involved in driving workflow integration, adoption and usage has been made increasingly visible. 70% agree that they have not seen major cost efficiencies yet but acknowledge there is always an adoption curve with new technologies, and 71% agree that speed to market is improving.

For many this has sparked a reappraisal of their investments to date as marketers realize that the technology is only a small piece of the change management agenda. In a sector moving at such unprecedented pace, it is perhaps unsurprising to see that 74% are considering discarding some of the tools they currently invest in and seeking tools trained on the nuances of their brand. Respondents in Asia Pacific, particularly China, are significantly more likely (84%) to agree that they need more custom tools. To that point, some 62% of CMOs feel like AI-assisted creativity cannot yet capture the tone of voice, look and feel of their brand, rising to 68% in the US and China, and 72% in France, although marketers in LATAM (47%), Brazil (43%), and India (38%) feel less strongly.

CMOs ARE FEELING MORE CAUTIOUS ABOUT IMMEDIATE EFFICIENCY GAINS

	2025	2026
GEN AI WILL MAKE A MASSIVE DIFFERENCE TO MY ABILITY TO PRODUCE ASSETS QUICKLY AND CHEAPLY	89%	82%
GEN AI WILL MAKE IT MUCH EASIER FOR ME TO IN-HOUSE A LOT OF MY MARKETING	90%	83%

(DON'T) CALL MY AGENT

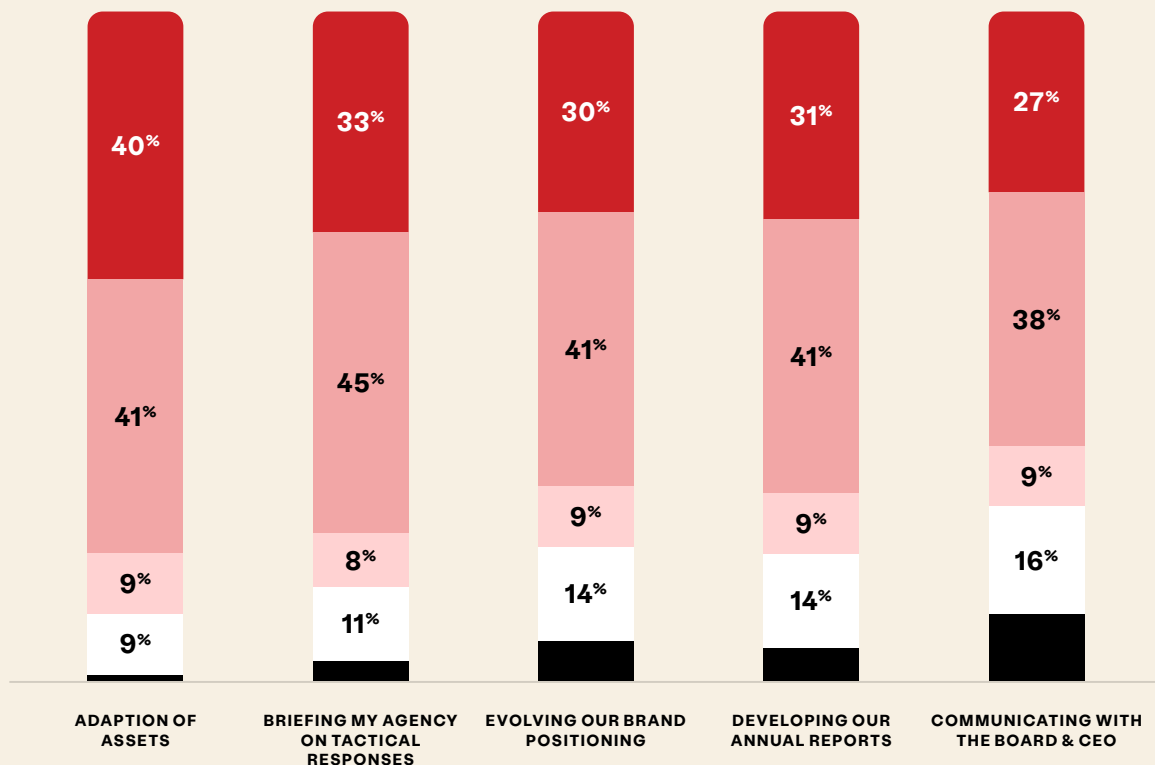
Meanwhile, the promise of Agentic AI will only be realized when the trust gap is bridged. Globally, 63% of CMOs say they are not comfortable delegating high-stakes tasks to Agentic AI for reputational reasons. This rises to 75% of Japanese marketers, dropping to 46% in India and 48% in Brazil. 65% of global CMOs express discomfort in trusting high-stakes tasks to Agentic AI for privacy and security reasons, down to 47% in India while 64% claim they are uncomfortable entrusting such tasks to AI because the personal touch still matters, rising to 69% in Japan, Canada and the UK and 70% in France.

Meanwhile, we see some intriguing patterns in the tasks marketers feel they could comfortably outsource to an agent, and perhaps therefore which tasks they mentally define as “high stakes.” Tasks that marketers would “very comfortably” outsource

to an agent without human intervention are adaptation (40%), dynamic optimization (38%), while levels are still surprisingly high for more strategic tasks – 31% claim they are happy for an agent to brief their agency on their strategic priorities. Comfort levels are lowest for communicating with the board and CEO, at just 27%, with the highest percentage of respondents (10%) stating that this task would never be delegated to an agent, rising to 16% in Canada and 14% in the UK and Australia. Upward management, it appears, remains a particularly human skill-set.

Overall, however, many marketers are in a “never say never” mindset when it comes to the role of agents – in contrast with their customers, many of whom have significant reservations about delegating even seemingly straightforward tasks to an agent, particularly where their financial data is involved.

HOW COMFORTABLE ARE YOU DELEGATING THESE TASKS TO AGENTS?



- Very comfortable with an agent actioning independently
 ● Comfortable but would require human sign off
- Don't know
 ○ Requires significant human involvement
 ● Would never delegate this task to an agent

FROM ASSETS TO IMPACT

AS ADOPTION OF THE TECHNOLOGY MATURES, MARKETERS' AMBITION FOR AI IS MOVING BEYOND SCALE FOR SCALE'S SAKE, WHICH NEARLY THREE QUARTERS OF CMOs AGREE IS LEADING TO "MORE SLOP, NOISE AND WASTED EFFORTS."

74% of CMOs are in agreement that "more assets doesn't mean more impact," rising to 78% in the US. 76% worry that they are making more content for less impact and visibility.

Measures of success are moving away from efficiency as a key KPI and towards greater effectiveness. While 78% of marketers agree that this is the year they expect to see AI deliver cost savings in their agency relationships, 86% agree that smart agencies will move quickly beyond using AI to drive efficiency, to using AI to drive impact and effectiveness.

While volume of assets, or cost per asset, has become industry currency, CMOs are uncertain of how to measure real world impact: 71% agree that while they know they need to generate more assets, they don't know how to balance cost vs return, a tension that's even more evident in the US at 76%.

81% still agree that they will need to produce "far more" content going forward, but priorities are shifting from volume of assets to value of connections. 3 out of 4 of CMOs agree that they are becoming less concerned about using AI for cost reductions and more interested in enabling greater personalization, relevance and responsiveness or freeing up time to be more customer-centric and culturally relevant. Reinvesting AI time savings in becoming more customer-centric and culturally connected is particularly important in China, at 91% agreement.

80% of marketers agree that AI-enabled production efficiencies are enabling them to invest in high-touch IRL experiences, 82% that efficiency savings are enabling investment in craft and creativity. This sentiment is particularly prevalent in APAC, with China leading the way at 87% and 93% agreement respectively.

CMOs ARE SHIFTING THEIR FOCUS FROM VOLUME OF ASSETS TO VALUE OF CONNECTIONS



76%

AGREE "I SOMETIMES WORRY THAT I'M MAKING MORE CONTENT FOR LESS IMPACT/VISIBILITY"



74%

AGREE "MORE ASSETS DOESN'T ALWAYS MEAN MORE IMPACT"

AGREE / STRONGLY AGREE

BUILDING INSIDE OUT

Internal systems and processes are also directly impacting how brands go to market. CMOs are increasingly realizing the need to design their organizational structures, technology stack and brand experience in parallel to connect with the end customer in meaningful ways.

As such 84% of respondents say they need a strategic production partner who understands the role of content across the customer journey, and over three quarters of CMOs believe siloed agency models separating creative, media, data and production mean their content isn't working as hard as it could be. Beyond customer-facing outcomes, 82% of CMOs say they need a marketing technology transformation partner who can help them with organizational change, not just the tools they use but processes and ways of working.

DESIGNING FOR DIFFERENCE

A PERFECT STORM OF SAMENESS IS CONFRONTING CMOS AS ALGORITHMIC NEWS FEEDS MEET AUTOMATED CONTENT.

Access to the same data and AI-enabled production techniques, used bluntly, have exacerbated the drift towards average, fine, familiar. Feeds are now flooded with content that feels increasingly indistinct and indifferent.

68% of CMOs agree that not enough brand experiences are distinctive and 87% that difference is more valuable than ever in a world of automation, rising to a near-consensus of 97% in China. This aligns with data from Kantar and the Said Business School showing that Difference is the single greatest driver of share price.¹

While it's easy to dismiss the flow of sameness as an industry preoccupation or cliché, consumers are feeling it in their feeds in a very real way, impacting their engagement with algorithmic platforms. 55% of consumer respondents in the Dentsu Creative Trends 2026 report agreed that they are "tired of the algorithm recommending more and more of the same" – a sentiment remarkably consistent across demographics (55% Boomers, 57% Gen Z).²

Yet today's CMOs face a dilemma in their pursuit of difference: 71% agree that "If I don't win with the algorithm, my content will be invisible," yet 78% agree that "Optimizing for the algorithm risks creating a sea of sameness." This has become a highly consistent picture year on year suggesting the challenge is ongoing and intransigent.

The advent of agentic search introduces a new challenge. 78% of marketers agree that Agentic AI risks making their brand experience invisible as research, recommendations and transactions happen via AI agents.

BRANDS TODAY MUST WIN WITH THE AUDIENCE, THE ALGORITHM, AND THE AGENT.



71%

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



78%

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

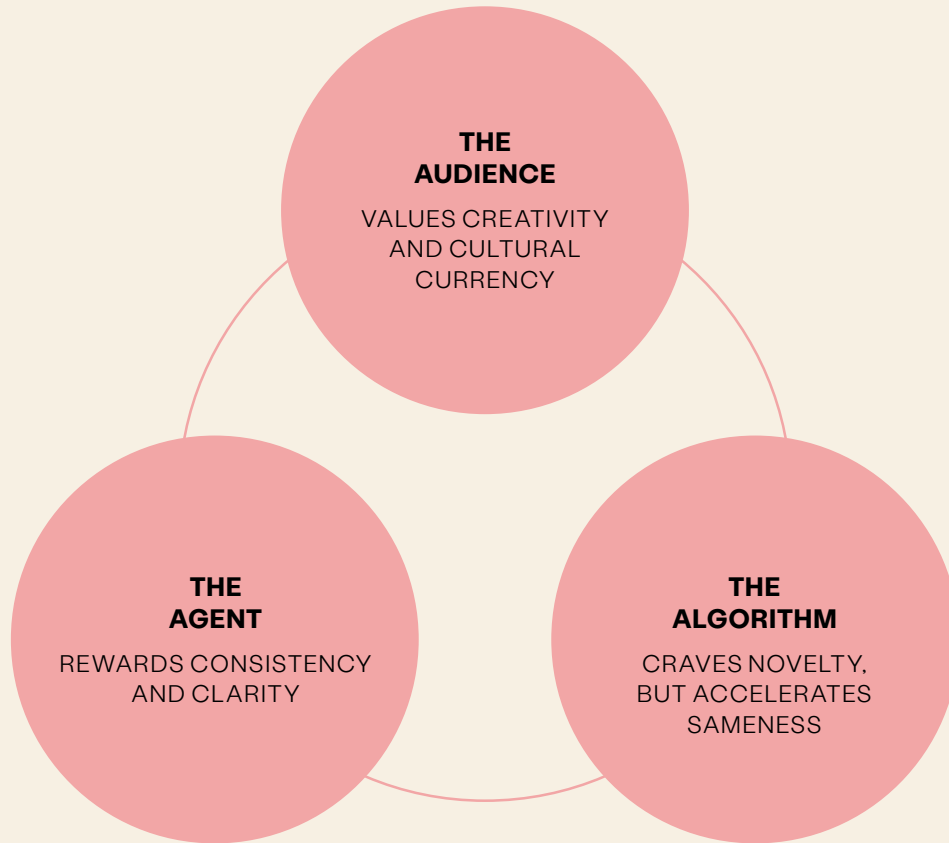


78%

AGREE "AGENTIC AI IS AT RISK OF MAKING MY BRAND EXPERIENCE INVISIBLE"

¹ "Think Different: The DNA of breakthrough brand value growth", Kantar, 2023

² Dentsu Creative Trends 2026 Report

**BRANDS TODAY MUST COMPETE
ON THREE FRONTS**

The result is that brands today must compete on three fronts. Winning with the audience. Winning with the algorithm, which craves novelty but accelerates sameness. Winning with the agent in a world where 68% of Google searches now resolve without clicks.³ All accelerating the need for compelling and distinctive brand stories. While difference is often perceived as a creative luxury or indulgence, in an algorithmic world we must shift towards difference as an operating system, embedded deep in tools, technology and workflows, balancing the need for consistent signals and cultural freshness.

In part this is about our ability to prioritize and champion the irrational, unpredictable thinking that can only come from human creativity. 81% of CMOs agree that human creativity is essential to creating ideas that are truly different in a sea of sameness, while 80% agree that without compelling craft up front, AI-enabled production risks simply delivering more sameness, in more places, more quickly.

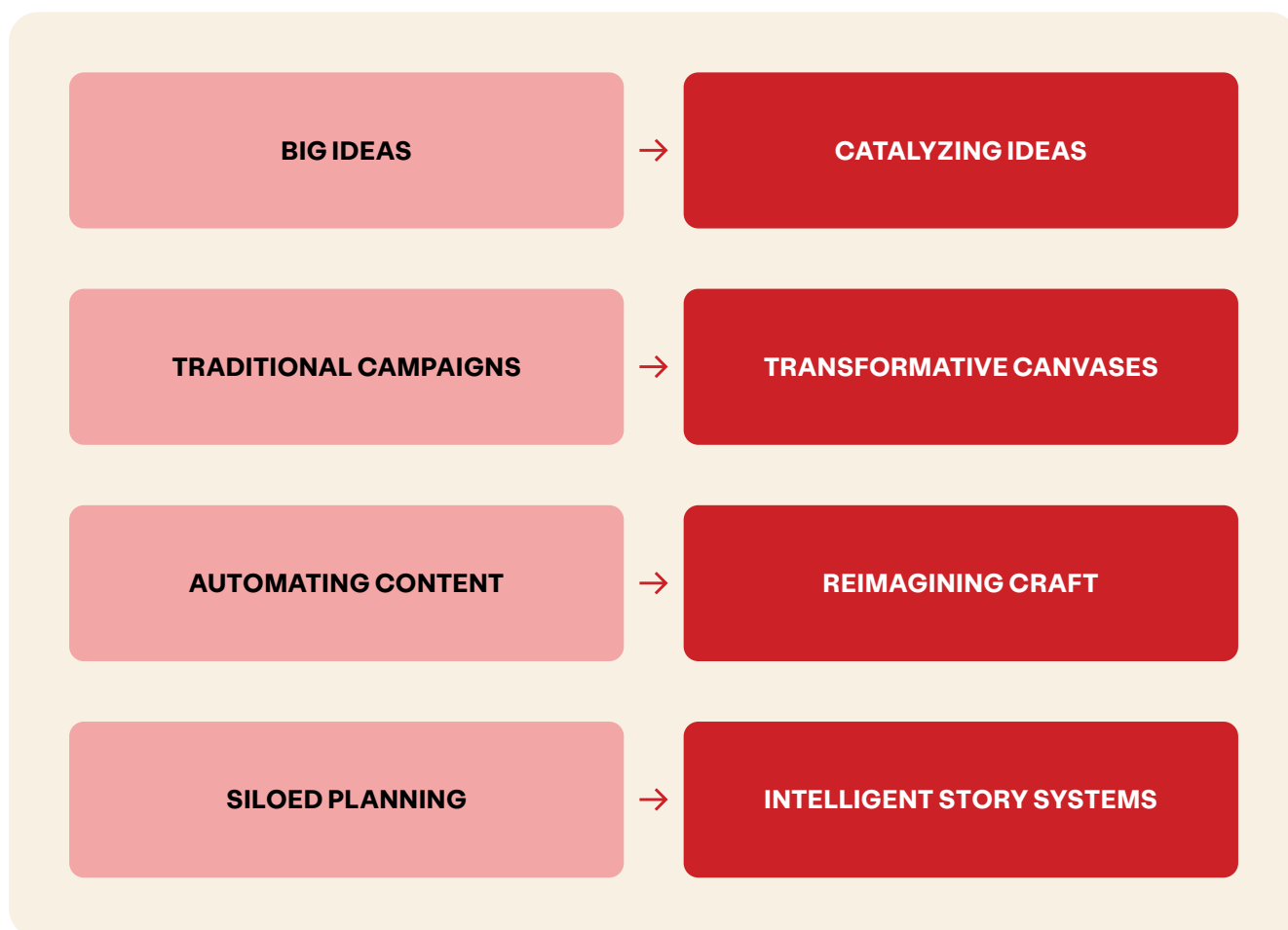
³ "In 2026, Less than One Third of Google Searches Still Send a Click", Sparktoro, June 2026

Yet it is not enough to simply champion difference at the conceptual or human-in-the-loop stages of the process. We must ensure difference is encoded in our AI-enabled tools and workflows, calibrating these systems to operationalize difference, not simply scale sameness. This means tools designed to identify clichés and conventions at scale, to highlight blind spots or biases or to take deliberately contrarian views rather than simply accelerate the speed of average.

In addition, we must design brands from the ground up to win with the algorithm without simply following the algorithm, embedding cultural, community and creator intelligence in our brand development processes.

This means a different approach to brand building, a different creative canvas, and a different approach to performance that marries intelligent automation with human storytelling. At Dentsu Creative we define it as the shift from Big Ideas to Catalyzing Ideas, From Traditional Campaigns to Transformative Canvases, from Automating Content to Reimagining Craft, and from Siloed Planning to Intelligent Story Systems.

FROM SCALING FOR SAMENESS TO DESIGNING FOR DIFFERENCE



SPIKY THINKING

WINNING WITH THE ALGORITHM WITHOUT FOLLOWING THE ALGORITHM MEANS EMBRACING A WORLD WHERE BRANDS ARE INCREASINGLY BUILT IN PARTNERSHIP WITH CREATORS, PARTNERS AND CULTURE-MAKERS.

A reality which means brands must be defined and dimensionalized in new ways – designed from the beginning with the hooks and spikes that make them easy to pick up, evolve and spread.

The legendary Jeremy Bullmore once described how brands are built like bird's nests: *"We build an image as birds build nests – from the scraps and straws they chance upon."*⁴ As powerful an analogy as this is, brands today must increasingly behave like burrs or seeds: spiky, sticky, easy to pick up, spread and propagate.

Brand power remains vital in a world of Agentic Commerce: 81% of CMOs agree that Agentic AI will mean strong brand preference is more important than ever if brands are going to remain in the shopping basket. But winning with the audience, the algorithm and the agent demands a new approach to brand building. At dentsu, we call it the Catalyzing Idea: not just a big idea that creates consistency across touchpoints but an idea that sparks change within the business and enables collaboration and co-creation outside the business.

84% of CMOs agree that they need ideas that can be spread, shared and co-created across a network of creators and collaborators, (rising to 93% in China, dropping to 70% in South Africa) and the same number agree that this makes brand clarity more important than ever: "The more our brand stories are told by new partners and collaborators, the more important a strong central brand idea becomes." 78% of marketers surveyed agree that "our brands should start a conversation, not finish one" rising to 85% in APAC.

BRANDS TODAY MUST BE BUILT IN NEW WAYS.



84%

AGREE "I NEED IDEAS THAT CAN BE SPREAD, SHARED AND CO-CREATED ACROSS A NETWORK OF COLLABORATORS"



78%

AGREE "OUR BRAND SHOULD START A CONVERSATION, NOT FINISH ONE"



84%

AGREE "THE MORE OUR BRAND STORIES ARE TOLD BY PARTNERS AND COLLABORATORS, THE MORE IMPORTANT A STRONG CENTRAL BRAND IDEA BECOMES"

⁴ "Understanding Brands Part 2 – The ties that bind", Jeremy Bullmore, 1996

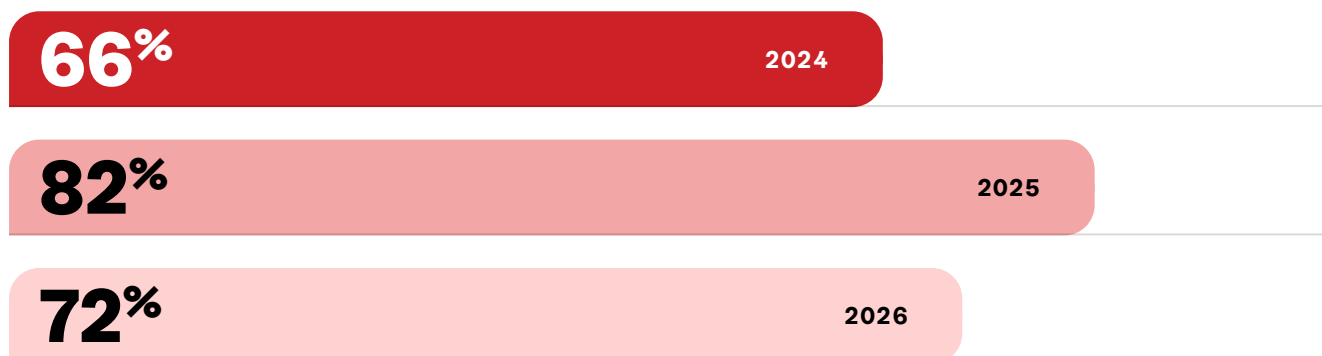
This reflects a shift in mindset where 79% of marketers claim to want ideas that start “social first and community up.” Similarly, 81% agree that “the key to successful influencer marketing is a brand idea that enables participation and co-creation.” The question is not brand marketing or creator marketing but how the two combine to build momentum around a compelling (and coherent) story. Nevertheless, a world where brands are built in partnership remains a source of anxiety: while 83% of CMOs agree that modern brands today are built through culture, community and creator partnerships, 72% worry about losing control. Similarly, 83% agree that brand stories will need to flex across audiences, creators and channels without losing consistency.

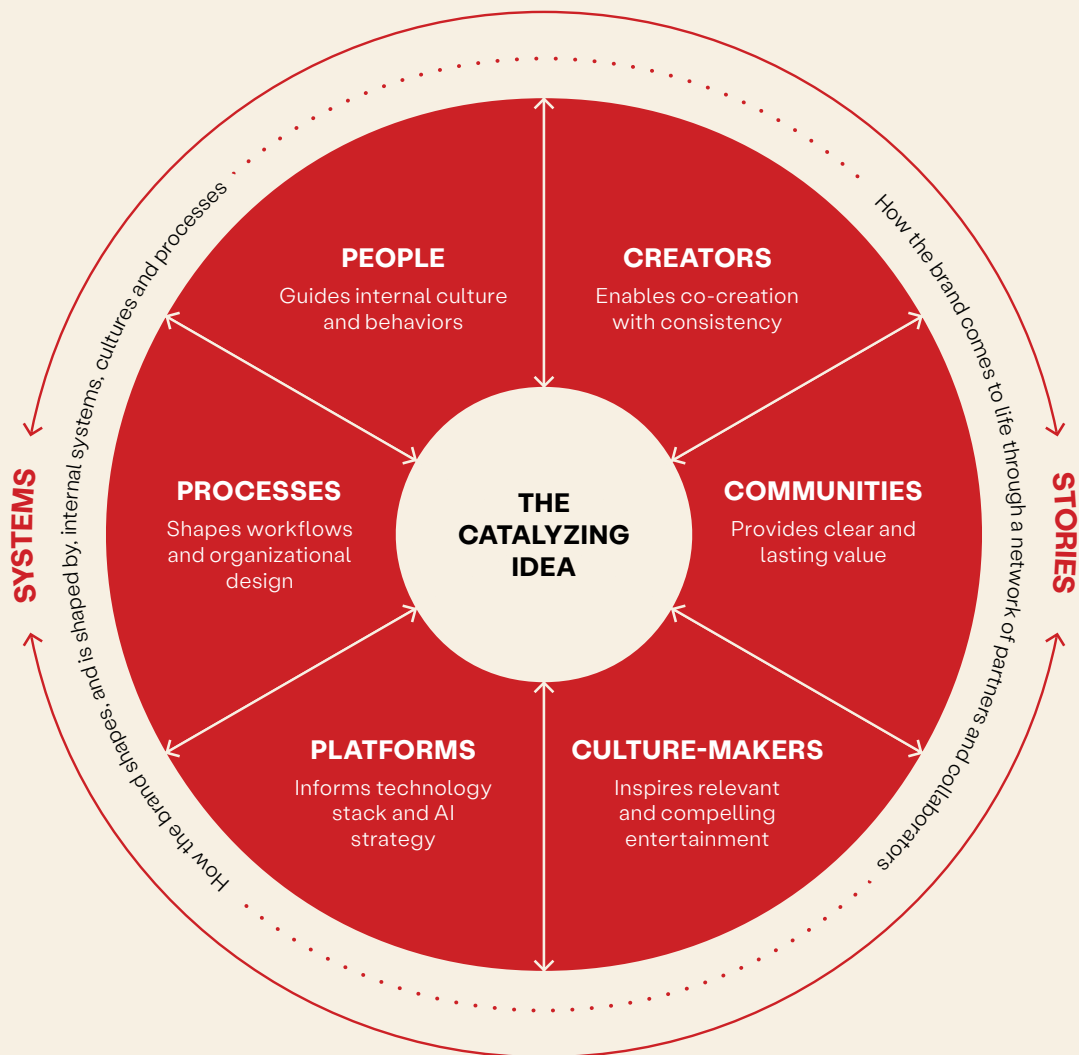
We see an opportunity to bring brand strategy and AI enablement together, designing intelligent story systems that ensure brands can travel through the modern media ecosystem, connecting in platform-specific ways and through authentic creator voices, with no loss of brand consistency, using technology to tell more human stories. While the narrator and voice may change, the story remains the same – a story that starts a conversation and invites others to write the next chapter.

IN THE FUTURE, BRAND MARKETING WILL BE MUCH MORE OF A PARTNERSHIP BETWEEN BRANDS, CREATORS & PLATFORMS



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





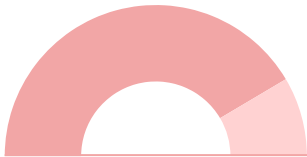
At the heart of these intelligent systems sits a Catalyzing Idea; an idea that not only impacts the Stories brands tell in market, but the internal Systems that make the brand promise a reality in market: the people, processes and tools. Building brands that resonate with audiences, agents and algorithms means operationalizing the brand deep in systems, tools and processes as well as the hearts and minds of employees.

TRANSFORMATIVE CANVASES

CMOS ARE ACUTELY CONSCIOUS OF THE NEED TO BUILD THEIR BRANDS IN THE SPACES AND PLACES THAT MATTER MOST TO CUSTOMERS, YET MANY STILL LACK A PLAYBOOK OR PROOF OF SCALABLE SUCCESS.

While marketers believe firmly in the importance of winning share of culture, not just share of voice (83%), credibility and strategic alignment remain a concern.

Over three quarters 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.” In fact, when asked about the biggest challenges facing their business in the next 12 months, nearly half of UK CMOs (48%) expressed concern about responding at the pace of culture - a full ten percentage points above the global average of 38% (down to 28% in Japan and Italy, 24% in China). Similarly, over half of German CMOs see “Knowing how or where my brand should credibly connect with culture” as a significant challenge.”



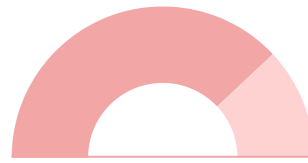
83%

AGREE **“I NEED TO WIN SHARE OF CULTURE, NOT JUST SHARE OF VOICE”**

CMOs also understand the power of entertainment to drive engagement and adoption of new services: 82% of respondents agree that consumers expect innovative content, products and services to look and feel like entertainment.

In consequence, developing owned entertainment platforms and IP is the top three priority in 26/27 marketing plans for Mexico (58%), South Africa (48%), and Italy (53%), whilst 44% of global CMOs are already integrating into entertainment, sports or other IP.

Alignment with culture also reflects the power of sports, music and entertainment to create shared moments of culture and to connect audiences at scale. Marketers nevertheless acknowledge that fandom is evolving rapidly, fueled by online engagement, the power of creators and fragmented rights ownership.

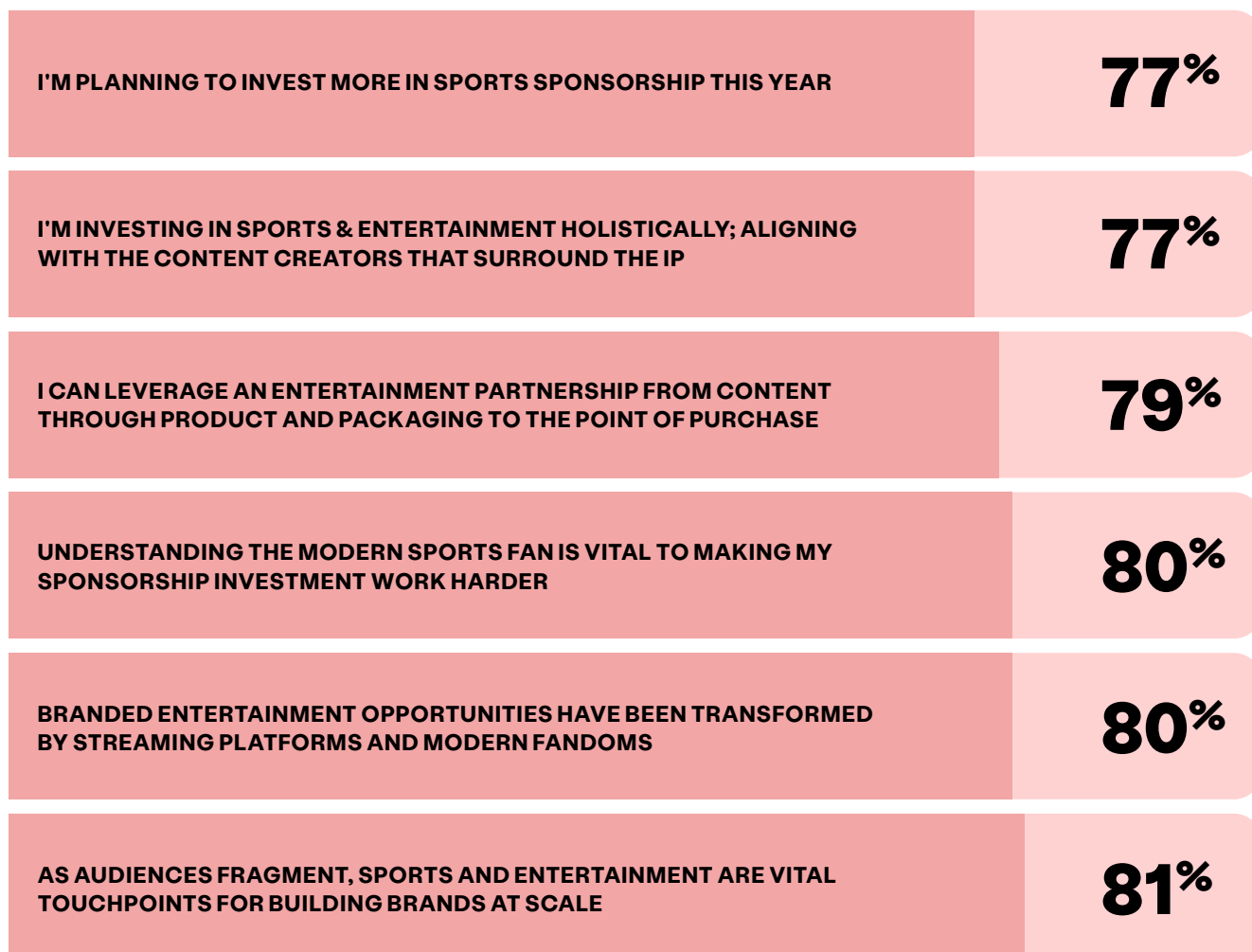


3 IN 4

AGREE **“THE FUTURE IS ABOUT BUILDING MY BRAND THROUGH CULTURE BUT THERE AREN’T ENOUGH TRIED AND TESTED WAYS TO DO IT”**

81% of CMOs agree that as audiences fragment, sports and entertainment are vital touchpoints for building brands at scale; but are evolving their approach as audience behaviors change and rights owners become more open to new creative and commercial models.

AGREE / STRONGLY AGREE



77% of respondents say they are investing in sports and entertainment holistically – not just partnering with the IP but aligning support with the content creators that surround the IP and influence the fandom. This rises 11 percentage points in China but drops 21 percentage points in Mexico. Globally, 80% of CMOs acknowledge that branded entertainment opportunities have been transformed by streaming platforms and modern fandoms, and that understanding the modern sports fan is key to maximizing the value of their investments.

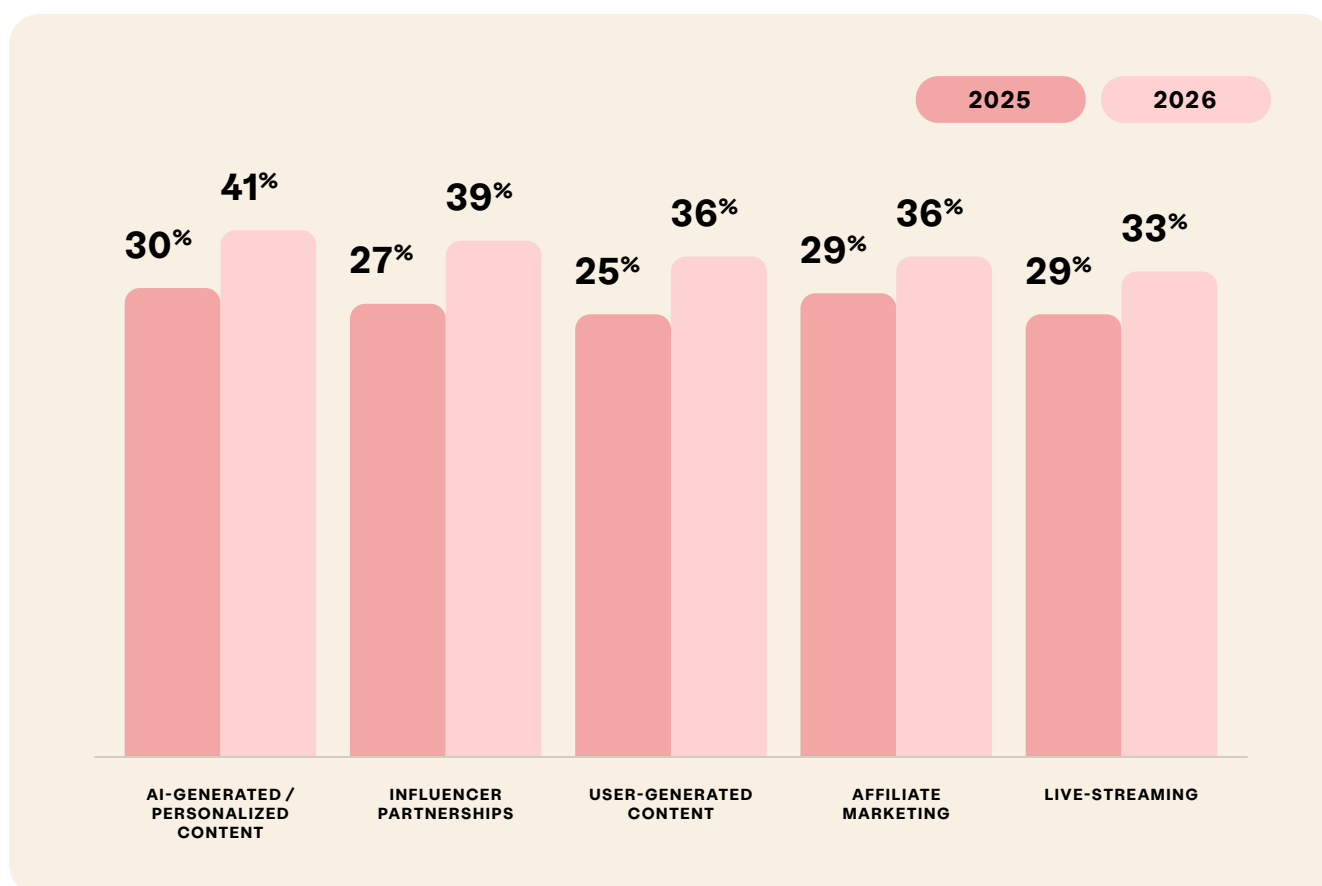
This shift reflects a broader evolution in how brands engage with fandom. Dentsu's recently expanded global [Fandom Intelligence](#) platform combines proprietary research across more than 21,000 fans and 200 entertainment properties to help brands identify which communities, creators and IP partnerships are most likely to generate authentic engagement and commercial return.

Meanwhile, new creator-led entertainment models are enabling brands to participate in the development of shows, formats and IP from inception rather than simply sponsoring content once audiences have formed, building cultural relevance through shared creation rather than borrowing attention.

Bringing together culture and commerce across the customer journey is increasingly important, with 79% of CMOs agreeing that entertainment partnerships can now be leveraged across the path to purchase, from content through product and packaging to the point of purchase. As traditional consumer cohorts become increasingly unsettled, 84% of marketers agree that they are interested in targeting their customers through their passions and communities, not just demographics or purchase behaviors.

When we look at the channels CMOs are currently investing in to maximize their cultural impact, we see significant growth in creator and community-led spaces. 39% of CMOs are investing in influencer partnerships (up 12 percentage points year on year), 36% in user generated content (up 11pp) and affiliate marketing (+6pp). The overlap between commerce and community continues to expand, with 33% investing in Live Streaming, 27% in Shoppable Content and 30% in Community Building through grassroots initiatives.

WHICH MARKETING TECHNIQUES ARE YOU ALREADY INVESTING IN TO CONNECT WITH CULTURE?



CONTEXT COMPOUNDS

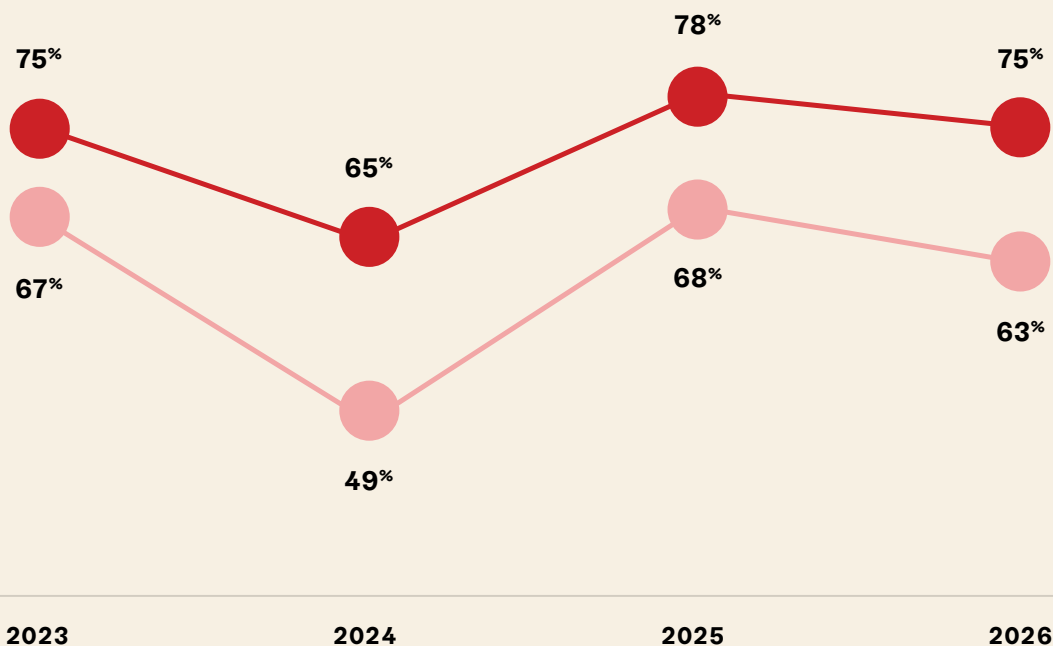
AS THE CONVERSATION AROUND AI-ENABLED PRODUCTION SHIFTS FROM EFFICIENCY TO IMPACT, CMOs ARE SEEKING TO CONNECT MEDIA, PRODUCTION, AND DATA TO MAXIMIZE THE POWER OF CONTEXT AS A FORCE MULTIPLIER.

Many remain ambivalent about the ability of AI-generated content to generate emotion. For the past four years we have tracked how CMOs respond to statements such as “Generative AI will not be able to create ads that move people” and “Generative AI will never replace the human imagination.” After a precipitous drop in 2024, agreement with these statements has remained relatively stable YoY at 63% and 75% respectively.

French CMOs are most likely to believe Generative AI will not be able to move us, at 80%, while Spanish CMOs are more open to the possibility at 49%. However, while AI is not expected to deliver the emotional “big bets” of Super Bowl ads and Christmas spots for most brands, CMOs are firm believers in the combination of content and context to unlock growth. The alchemy of connecting the right audience with the right experience in the right moment in increasingly intelligent ways creates an emotion of its own.

CMOS ARE NOT CONVINCED THAT AI CAN EVER CREATE CONTENT THAT MOVES PEOPLE

AGREE / STRONGLY AGREE



● Gen AI will never be able to replace human imagination ● Gen AI will not be able to create ads that move people

Dynamic creative optimization is a top three priority for CMOs in 2026-7 with 85% of marketers agreeing that “Real-time content personalization helps to drive growth.” Conversely, 77% believe that siloed agency models separating creative, media, data and production mean their content isn’t working as hard as it could. 75% struggle with the disconnect between media and production: they have the data they need to personalize the customer experience but not the assets.



85%

AGREE “REAL TIME CONTENT PERSONALIZATION HELPS TO DRIVE GROWTH”

To tackle this, marketers want to combine agile production with intelligent data to meet the right customer with the right message at the right moment (83%). A similar number agree that Generative AI can assist in the design of more helpful, personalized and dynamic experiences – strongly felt in China at 96%, down to 70% in France and 68% in South Africa. 72% of businesses in Australia are already using AI to personalize experiences and tailor messaging and content towards those goals, 13 percentage points above the global average.

This approach to connecting content and context becomes all the more important as traditional audience cohorts destabilize – around 85% of marketers in the US, Canada, Germany, UK, Italy and Brazil agree it’s more important to target dynamic customer signals than static customer segments, rising to 92% in India and 94% in China.

We see a compelling opportunity however to go beyond traditional DCO and towards dynamic storytelling; partnering brand and systems thinkers to create more connected and powerfully human stories. Not just the next best action but the next best chapter of the story, from the next best storyteller.

Increasing synergies between media, creative and production may also help brands strike the optimal balance between assets and impact, as touched on in chapter 2. [Research from WARC and CreativeX](#) shows that while brands’ creative output has increased by 30% on average, average spend per asset has declined by 15%, with more than 90% of assets receiving less than \$10,000 in media support.⁵ Success, they argue, will belong to the brands most able to connect media and creative supply chains both to predict future success and to maximize investment in top-performing content.



77%

AGREE “SILOED AGENCY MODELS SEPARATING MEDIA, CREATIVE, DATA, PRODUCTION **MEAN THEIR CONTENT ISN'T WORKING AS HARD AS IT COULD**”

⁵ “The media investment gap: why marketers are producing more ads than they can afford to support”, WARC

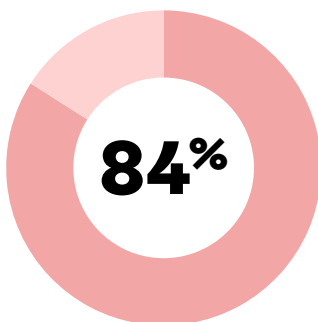
ONLY HUMAN

IN A WORLD OF AUTOMATION, HUMAN INTUITION, CRAFT AND EMPATHY COMMAND A PREMIUM ACROSS EVERY DISCIPLINE AND STAGE OF THE CREATIVE PROCESS.

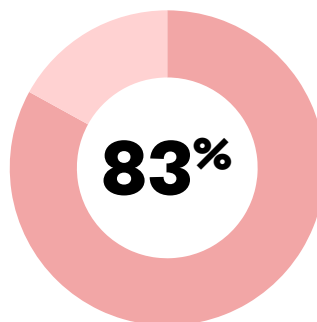
84% of CMOs surveyed are seeking strategists with human empathy and creativity, agreeing that empathetic human truth will become more important in a world of perfect information. 78% of marketers agree that human creativity is the only way to make lateral leaps forward, not logical next steps. Humans may choose to challenge what the data is telling us or find a more empathetic or intuitive route.

CMOs are increasingly turning to fandoms (up 4 percentage points YoY) and social listening. While marketers embrace synthetic respondents for pace and scale, 83% agree that “hearing from real customers is more relevant than ever in an AI driven world.” Similarly, as AI-assisted production accelerates, human craft and design skills matter more than ever for some 83% of CMOs. A similar percentage agree that human craft is critically important in the creation of distinctive brand ideas (rising to 91% in the APAC region).

INTIMATE, HUMAN-TO-HUMAN INSIGHT BECOMES MORE IMPORTANT IN A WORLD OF AUTOMATION

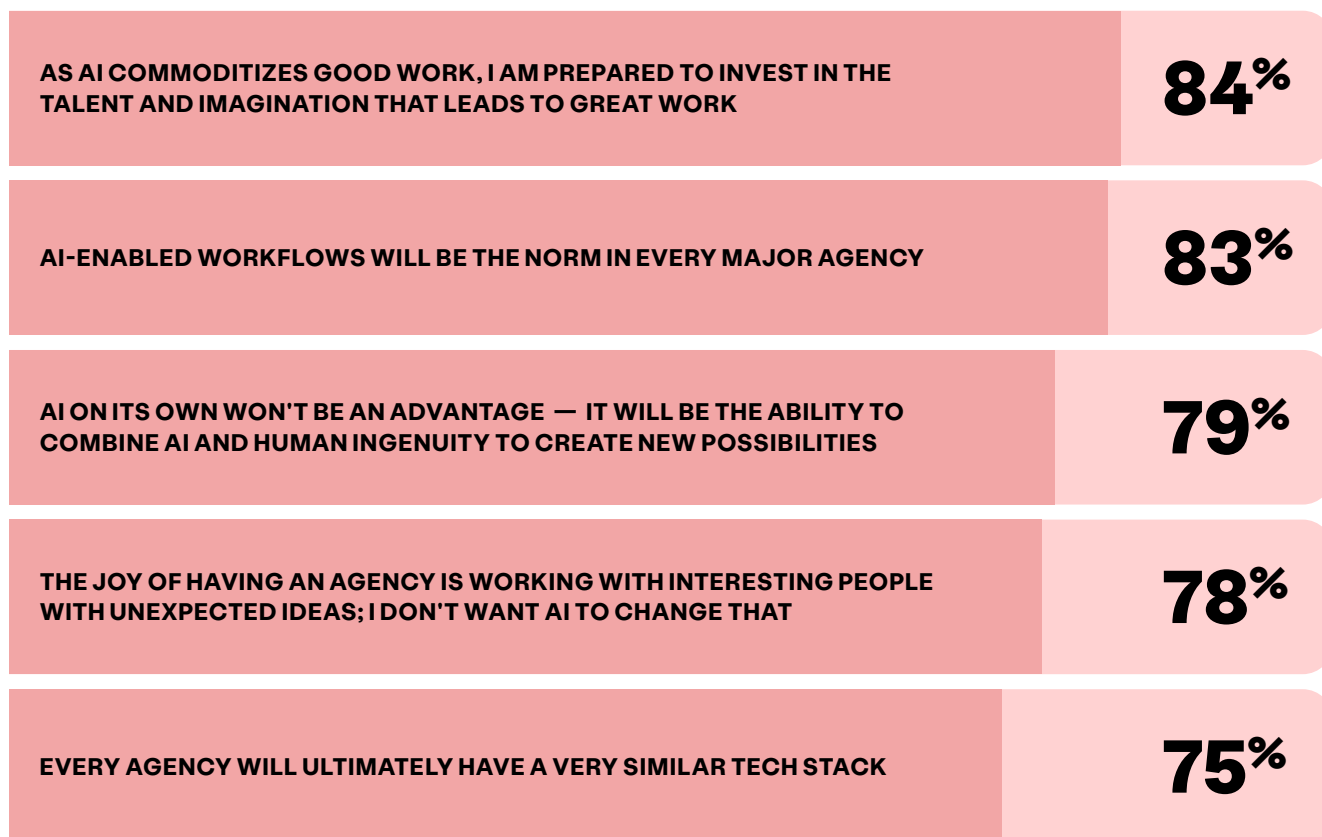


AGREE “**EMPATHETIC HUMAN TRUTH** WILL BECOME MORE IMPORTANT, NOT LESS, IN A WORLD OF PERFECT INFORMATION”



AGREE “**HEARING FROM REAL CUSTOMERS IS MORE RELEVANT THAN EVER** IN A WORLD DRIVEN BY AI”

AGREE / STRONGLY AGREE



79% of marketers believe that AI on its own won't be a competitive advantage – the advantage will come from the ability to combine AI and human ingenuity to create new possibilities. To that point, 83% of CMOs believe AI should give talented individuals superpowers, not replace them. The same percentage note that while AI makes it easier to get to good work, the talent and imagination needed to get to great work will be more valuable than ever – and they are willing to invest accordingly.

CMOs across the globe are clear that while technology will undoubtedly accelerate and streamline workflows, it will rapidly become table-stakes.

75% of marketers agree that “every agency will ultimately have a very similar technology stack,” rising to 83% in the UK. 83% also agree that “AI-enabled workflows will be the norm in every agency,” rising to 95% in China and 94% in India.

However, as the tools and technology become ubiquitous, they are no longer a differentiator. The differentiator remains human talent, and the joy of working with lateral thinkers remains a key reason for clients to prize their agency partners: 78% agree that “the joy of having an agency is working with interesting people with unexpected ideas; I don't want AI to change that.”

THE SCALE OF SMALL

BUSINESSES ARE RECOGNIZING THAT NETWORKS OF MICRO-INFLUENCERS, CREATORS AND COLLABORATORS ARE POWERFUL NODES FOR DISTRIBUTING IDEAS WITH AUTHENTICITY AND CULTURAL RESONANCE.

Big ideas are being built from smaller, more authentic voices up, as brands recognize the multi-faceted role of influencers in resonating with the audience, the algorithm and the agent.

80% of marketers, for example, are using influencers to build brand visibility/discoverability within AI search, while 87% agree that AI will transform the future of search. This resonates with one of the major themes emerging from the Cannes Lions Festival: influencers are no longer considered as an afterthought but as vital brand infrastructure.

With some 70% of marketers agreeing their paid media investments are less effective than they used to be, 83% of CMOs believe engaging communities is a powerful new way to scale brand impact (rising to 91% in APAC, 95% in China). 81% believe that real, relatable creators (like nano influencers) drive better performance than celebrities. Meanwhile, 81% of marketers believe that influencer content generates greater engagement than traditional advertising.

CREATORS PLAY A MULTIFACETED ROLE WITHIN MODERN MEDIA



81%

AGREE "I BELIEVE REAL, RELATABLE CREATORS (E.G. NANO INFLUENCERS) **DRIVE BETTER PERFORMANCE THAN CELEBRITIES**"



81%

AGREE "I BELIEVE **SOCIAL AND INFLUENCER** CONTENT GENERATES MORE ENGAGEMENT THAN TRADITIONAL ADVERTISING"



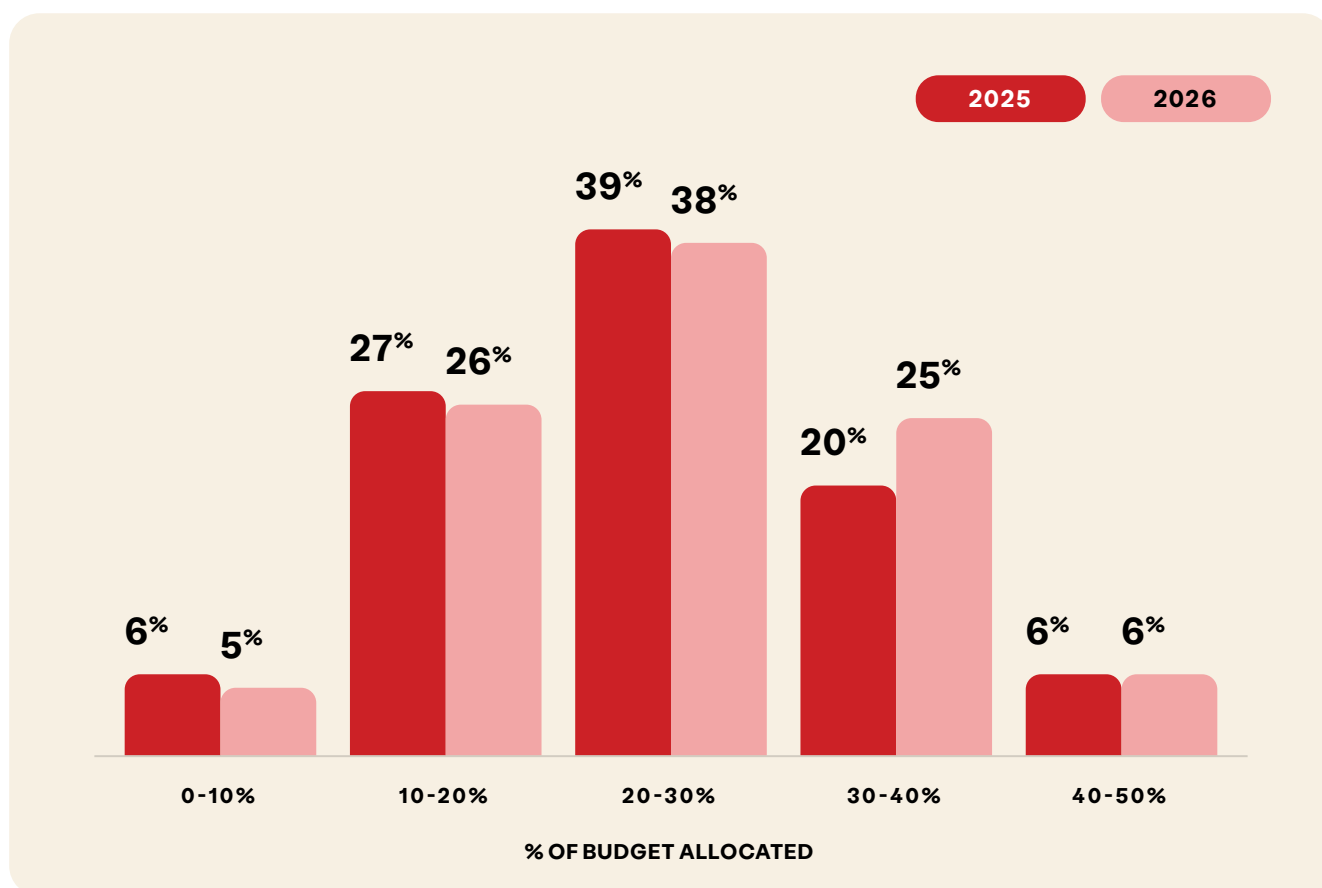
80%

AGREE "I AM **USING INFLUENCERS TO BUILD BRAND VISIBILITY** / DISCOVERABILITY WITHIN AI SEARCH"

Building on our “Only Human” theme and the importance of building brands that spark a conversation rather than finishing one, CMOs are also using influencers to help connect with emerging trends and needs within their communities. The biggest challenge cited by North American CMOs in the next 6-12 months (49%) is the expectation to “use data to provide insight on consumers today and also predict future products and propositions” – aligning with influencers close to audiences will be invaluable in enriching this insight. 46% of CMOs agree that social media offers opportunities for a direct, always on conversation with customers and visibility into emerging trends (47%).

As consumers seek out authentic community, word-of-mouth endorsement through micro influencers and networks become essential. 38% of marketers expect to allocate 20-30% of their budget towards social and influencer marketing in 2026/7, with 25% planning to invest between 30% and 40%. This represents a steady increase of 5 percentage points on 2025, and a gradual but sustained shift towards a significantly higher share of budget for creators and influencers within the overall marketing mix.

HOW MUCH OF YOUR BUDGET DO YOU PLAN TO INVEST IN SOCIAL AND INFLUENCER MARKETING IN THE COMING YEAR?



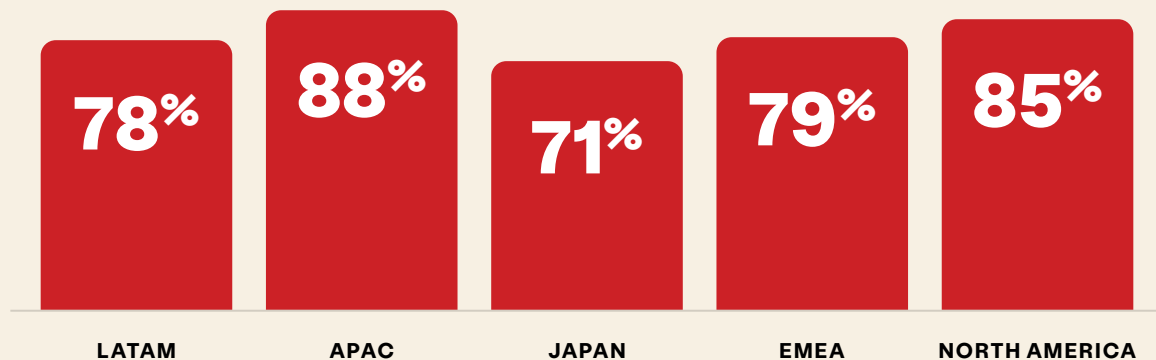
SEEING IS BELIEVING

CMOS ARE PRIORITIZING REAL-WORLD TOUCHPOINTS, IN PART FUELED BY CONCERN THAT AGENTIC SEARCH AND COMMERCE MAY MAKE THEIR BRAND EXPERIENCE LESS VISIBLE AND MORE HOMOGENEOUS.

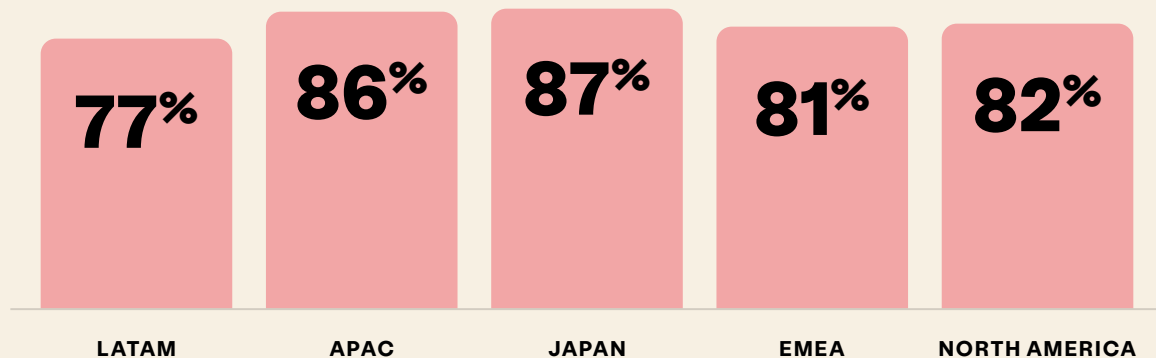
Marketers plan to increase their investment in out-of-home, packaging and events in an algorithmic world where online experiences are often fragmented, reflecting the consumer's desire for more tactile, analog experiences and in-person socializing. 58% of consumers state that they are seeking out human-created content for authenticity, while 64% value handmade products and handwritten notes more than ever. Many are seeking phone-free, analog experiences in an always on world.⁶

82% of CMOs agree they are planning to invest more in real-world experiences, rising to 87% in the US and India, and 90% in China, falling to 71% in Japan. A reinvestment in physical touchpoints is not just about reach – 83% believe that as digital newsfeeds become more automated and repetitive, the physical world of posters, packaging, and events is becoming the primary channel for building distinctive brand assets. 82% agree that “events and experiential are becoming more important in a world with fewer shared experiences.”

“I’M PLANNING TO INVEST MORE OF MY BUDGET INTO REAL-WORLD EXPERIENCES”



“THE PHYSICAL WORLD IS MY PRIMARY CHANNEL FOR BUILDING DISTINCTIVE BRAND ASSETS”



⁶ Dentsu Creative Trends 2026 Report

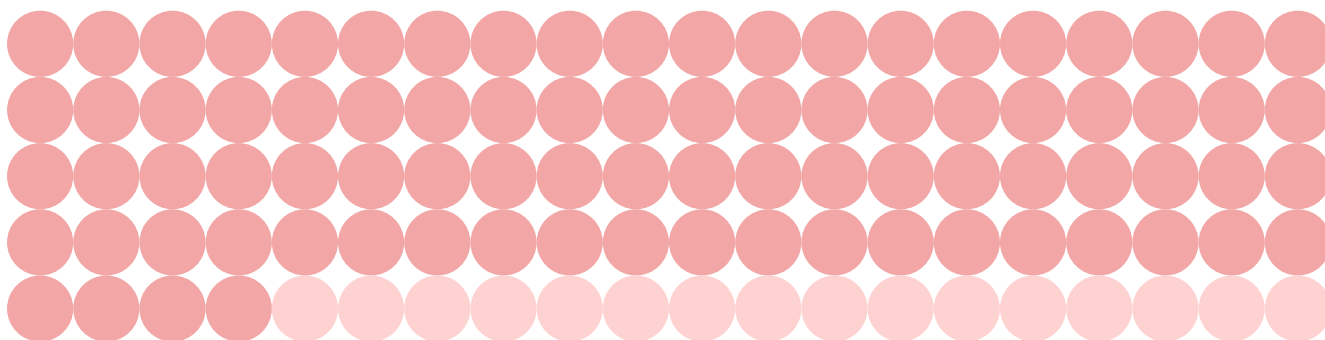
Likewise for some 85% in the APAC region, out of home re-emerges as “one of the last opportunities to build shared brand touchpoints and understanding,” whilst in-person and in-store experiences are increasingly important opportunities for innovation for 80% of respondents around the world.

When it comes to brand experience, CMOs see the power of combining emerging technologies and real-world experiences. 84% are planning to invest in immersive offline or in-person experiences, rising to 88% in Germany, 90% in China, and 91% in India. 80% agree that “In store or in person experiences are increasingly important opportunities for innovation,” China again leading with 90% agreement. Meanwhile, 83% agree that “Brands today are built through experiences,” and the same percentage that “Every touchpoint should tell the brand story, from comms to commerce.”

While “Faux OOH” stunts continue to play their role in capturing attention and news feeds, increasingly brands are going the extra mile to show backstage and behind the scenes footage, as reality proves to be the new luxury. Interestingly, a significant 80% of global CMOs agree that AI-driven production efficiencies are allowing them to reinvest budget into high-touch IRL experiences, showing the increased desire for fixed points in a fast-moving algorithmic world and perhaps the opportunity physical touchpoints offer to connect and hear from real customers.

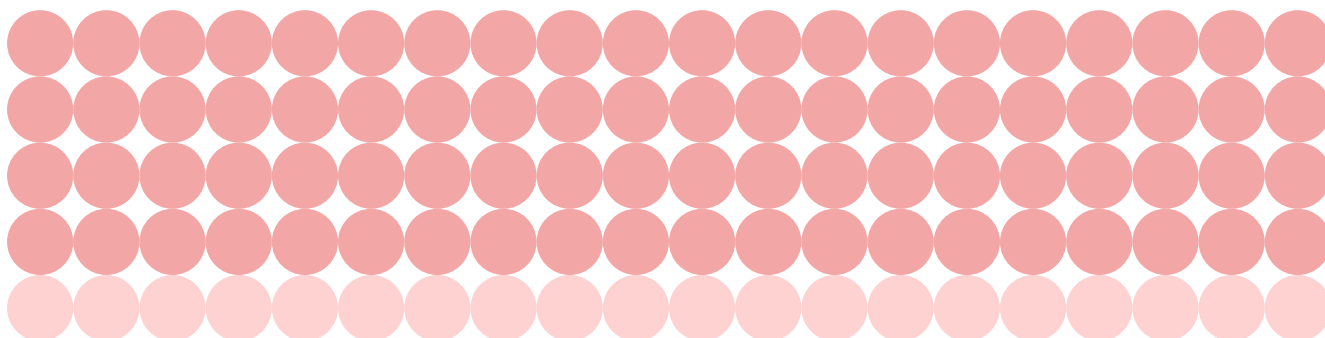
84%

AGREE “I AM PLANNING TO INVEST IN **IMMERSIVE
OFFLINE OR IN-PERSON EXPERIENCES**”



80%

AGREE “**IN-PERSON OR IN-STORE EXPERIENCES** ARE
INCREASINGLY IMPORTANT FOR INNOVATION”



PRACTICAL MAGIC

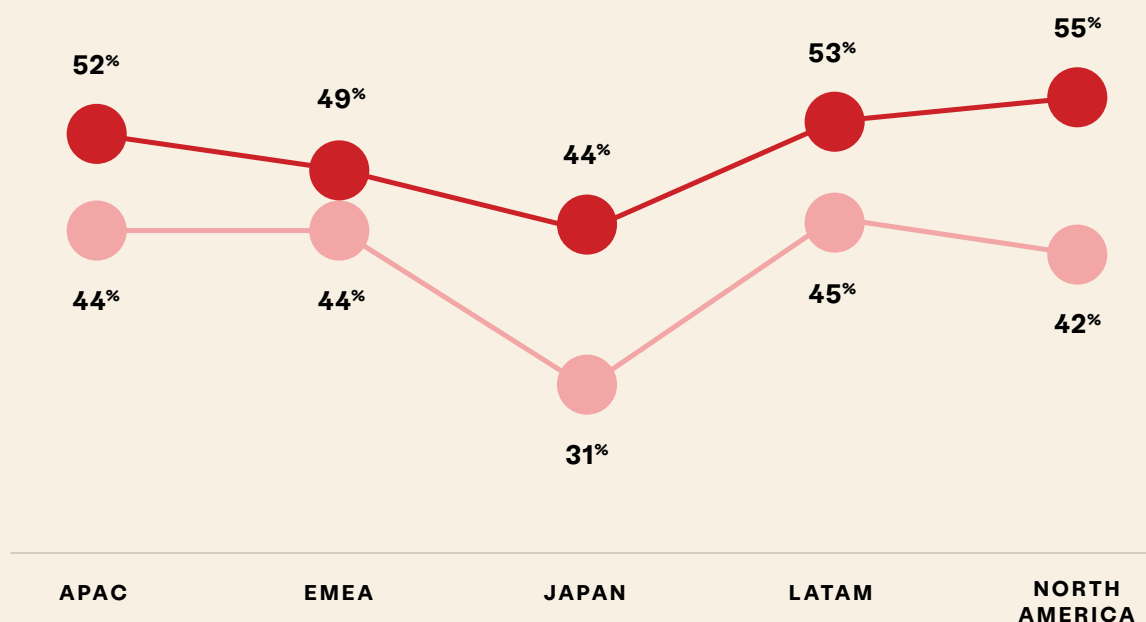
FINALLY, IN THE QUEST FOR REAL, CLIENTS ARE SHIFTING BEYOND A “SHINY OBJECT” APPROACH TO DEMAND INNOVATION AGAINST THEIR MOST PRESSING CHALLENGES.

Over half of CMOs agree that “innovation means fundamentally transforming our business for the future” and 80% of CMOs agree they want innovation against their biggest, most urgent business challenges, not as a side project. A similar number (83%) believe innovation is critical to the long-term success of their brand and organization, rising to 95% of CMOs surveyed in China. As such, marketers recognize that the success of their innovation initiatives might not be measured in immediate revenue but in long term growth.

Demonstrating intent, some 65% of CMOs plan to allocate a significant 20-40% of resources to innovation, requiring a reassessment of ‘who’ leads on innovation within the business. 43% feel that meaningful innovation in their business tends to start with product and R&D teams. However, over half of global CMOs agree “innovation that starts with the marketing team can impact the entire business, showing what’s possible,” an increase of 7 percentage points YoY. Modern CMOs believe real innovation requires collaboration across silos (83%), while 79% surveyed feel they need an agency partner to help them innovate, demonstrating the importance of cross-disciplinary teams in a world where technology, brand and employee experience are becoming more and more interdependent.

WHICH OF THE FOLLOWING STATEMENTS ALIGNS WITH WHAT INNOVATION MEANS TO YOU AND YOUR BUSINESS?

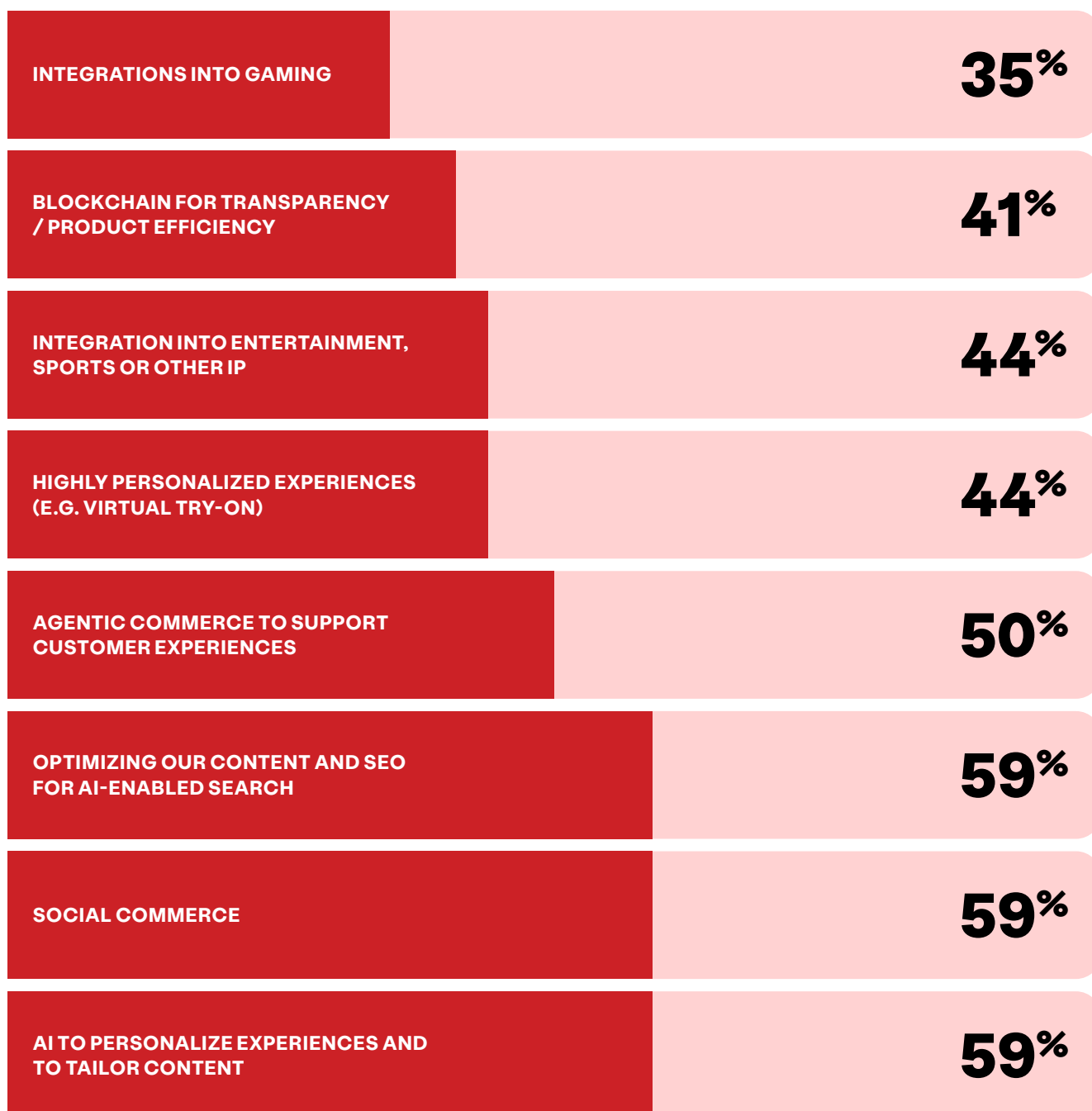
AGREE / STRONGLY AGREE



● Innovation means fundamentally transforming our business for the future ● Innovation means exploring what's next

We increasingly see marketers drawn towards innovation as a sustained driver of transformation rather than a temporary spark or experiment. 51% agree that innovation, for their business, is about “fundamentally transforming for the future,” up 6 percentage points year on year. 46% agree that they need innovation from their agency partners directed at operations and supply chain (also up by 6 points year on year). An equal number globally want their agency partners to innovate in areas that surprise and delight the end consumer, but some interesting variations arise across markets, with Mexico, India, Germany and Italy more likely to want consumer-facing innovation from their agencies than infrastructure plays.

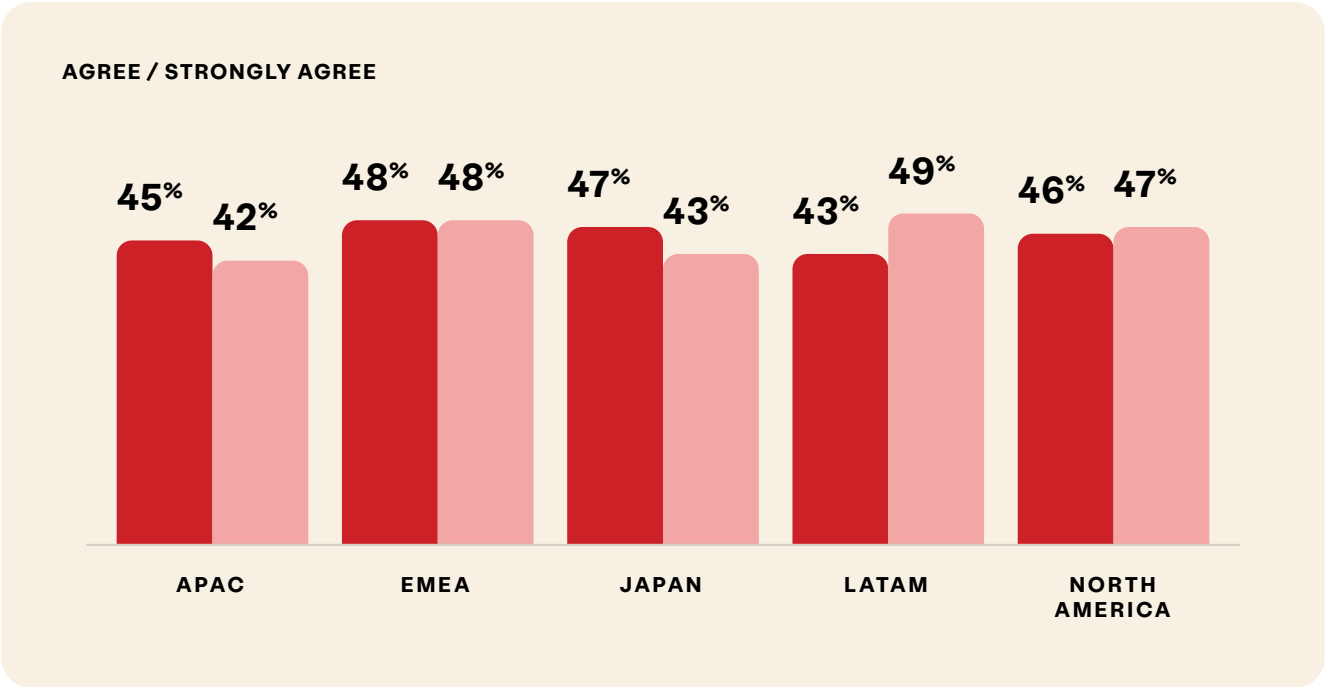
WHICH OF THE FOLLOWING INNOVATION STRATEGIES ARE YOU ALREADY USING?



Many CMOs remain committed to experimentation that surprises and delights, perhaps in line with their view that new behaviors and habits start with entertainment. Among the technologies CMOs are investing in to support their innovation initiatives, a majority (59%) are already optimizing for AI-enabled search, and 1 in 2 are already investing in Agentic Commerce to support the customer experience. Social Commerce is also showing high levels of investment, with 59% already adopting this strategy, showing that marketers will continue to balance the agent, the algorithm and the audience going forward.

Integration into gaming, sports and entertainment properties is also a significant area of focus for CMOs' innovation efforts as they look ahead, once again reinforcing the importance of an end-to-end approach to partnership that goes far beyond badging or sponsorship to encompass commerce, data and shared IP.

WHICH OF THE FOLLOWING ALIGNS WITH WHAT INNOVATION MEANS TO YOU AND YOUR BUSINESS?



- I need agencies to help me innovate my operations and content supply chain
- I need agencies to bring me innovative ideas to surprise / delight customers

WE SEE CMOS AROUND THE WORLD DRAWN TOWARD ALL THINGS REAL, TANGIBLE AND MEASURABLE.

They want to see tangible results from investments in AI, but their expectations are evolving. There is less expectation of instant efficiency gains and greater emphasis on organizational and cultural transformation working hand in hand with technology, with the aim not of delivering more assets, more efficiently, but of creating more impact, relevance and human connection.

We also see a desire to invest in spaces and places that feel real, human and authentic. Out-of-home, packaging, events and experiences are valued as fixed touchpoints in a fluid, unpredictable landscape. Partnering with sports and entertainment properties is also a high priority in a world where shared experiences and cultural references are harder to find. CMOs are also seeking brand ideas that are designed to move beyond the marketing bubble to survive and flourish in the real world. Free-range brand ideas, or what we at dentsu call Catalyzing Ideas.

Only by building ideas that are adopted, evolved and propagated by others as much as the brand owner, can marketers expect to win with the algorithm, the audience and the agent. Several recent studies show that audiences and LLMs rarely agree on what makes good advertising, but they can perhaps align on what makes a powerful brand, at the intersection of consistency and cultural freshness.

However, brands today must not only be fit to travel outside the organization, they must shape, and be shaped by, internal organizational dynamics, technology choices and culture. This marks a fascinating shift where brands cease to be an abstract idea and become organizational infrastructure. An intriguing outcome will be if our investments in AI on the one hand and influencers on the other makes brand more fundamentally important to organizations than ever before.

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 2026, 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.

THANK YOU

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.



PART OF THE DENTSU CMO NAVIGATOR SERIES