

Growth Study

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# The State of Marketing 2026

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**KANTAR**

CMOTALK+

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# Foreword by Klaas Weima

Founder CMOtalk



This is the second edition of our State of Marketing study. Based on more than 100 interviews with marketing and brand leaders. Over 50 percent more than last year. Once again, the study focuses on the heart of the marketing profession: driving and analysing companies' growth agendas. Alongside the key growth KPIs and barriers to growth, we again examined the impact of artificial intelligence on the marketing discipline. New this year is a focus on the fastest-growing part of our field: creator marketing.

A few conclusions stand out for me. First, the importance that organizations assign to brand equity; this is ranked as the second most important growth KPI. This is striking, because CMOs still struggle to translate brand equity into financial value, and financial value is precisely the language the boardroom speaks. This may also explain why more than half of marketing leaders say that other executives see their work mainly as a communications and brand function, rather than as a driver of growth and value.

Second, a sense of realism about the impact of AI is setting in among marketers. Yes, CMOs believe that AI influences growth and innovation, but only one in ten thinks it rewrites all the rules. In the study, we call this the AI paradox: expectations are high, but the tangible results marketers see in their day-to-day work are lagging behind. A key reason is the skills gap: only 23 percent say they have the right skills to apply the technology effectively.

A third conclusion is that only 12 percent of CMOs see creative excellence as a strategic driver of growth. As more and more execution and content creation is handed over to algorithms and agents, a sharp view of your brand positioning and brand foundations becomes essential. Otherwise, the output risks not being distinctive enough. And that is exactly where marketing's role lies: safeguarding the brand's essence and orchestrating both the human and the agentic workforce.

CMOs must take the lead now and fundamentally rebuild their departments. This calls for new roles, skills and capabilities, with

the primary aim of protecting the brand and steering it through choppy waters. That leadership is sorely needed, because otherwise creators, tech platforms, and AI chatbots will make off with your brand essence.

It would be wonderful if this study prompted you to take action. Which conclusions will you act on tomorrow? Happy reading, and I hope you find plenty of inspiration!

# Introduction

## Why this paper?

Last year, we established a baseline for how marketing leaders in the Netherlands define growth, the barriers they face, and the role marketing plays in delivering it. This second edition of The State of Marketing allows us to track how the profession is evolving over time.

The context has changed. Artificial intelligence is moving from experimentation towards adoption, creator marketing continues to grow, and organisations face increasing pressure to balance immediate commercial performance with sustainable growth.

Against this backdrop, this year's study explores a simple question: what does effective marketing leadership look like in a more complex and increasingly distributed marketing landscape?

Throughout the report, *Through the Lens of the Blueprint* sections connect the findings to Kantar's evidence on how brands grow through meaningful difference, predisposition, presence and finding new space for growth.

### Methodology

The State of Marketing 2026 is based on more than 100 interviews with marketing leaders, CMOs, heads of brand and marketing, commercial directors and other senior decision makers across a wide range of industries, company sizes and strategic orientations.

The findings were analysed through a combination of expert interpretation, Kantar's AI-enabled qualitative interviewing platform Converser, and two closed deep dive sessions with marketing leaders, where the results were discussed, challenged and refined.

# Executive Summary

## Reclaiming the CMOs role as guardian of brand value

When asked how they define marketing-driven growth within their own organisation, CMOs increasingly point to brand equity as a key growth metric. The proportion citing brand equity as an organisational KPI has risen from 37% to 52%, making it the second most important KPI after volume and revenue growth. In doing so, it has overtaken customer acquisition, which held the number two position last year. Furthermore, strong brand positioning remains the number-one perceived driver of long-term growth, increasing even further from 63% to 76%. These

are significant shifts. Yet this conviction is not shared upwards. Only 27% of non-marketing executives view marketing as a strategic growth driver, while 55% still see it as a communications and branding function. The central tension is clear: while CMOs increasingly champion long-term brand value, many executive teams continue to view marketing primarily as a communications function rather than a growth engine. The opportunity is to reclaim marketing's leadership role as the driver of both short-term performance and long-term business value.

### Five things we learned

#### 1. Brand is back, but its value still needs to be translated.

Brand equity and positioning now dominate the growth narrative, yet CMOs still struggle to connect brand investment convincingly to the commercial outcomes their organisations prioritise: short-term sales impact, sustained demand growth, pricing power and future potential.

The challenge is not belief within marketing, but transferring that belief to the wider C-suite. Recognising: short-term sales impact, sustained demand growth, pricing power and future potential.

**2. Short versus long is the defining pressure.** While 59% describe their organisation's growth strategy as balancing short- and long-term thinking, the top pain points are short-term pressure from executives and shareholders [56%], siloed functions and poor alignment [51%], and lack of budget [38%]. One out of three CMOs doubt leadership is fully aligned on what actually drives growth, a structural block to a test-and-learn culture.

**3. Creative excellence is undervalued.** While only 12% rate it as a key long-term growth driver, Kantar evidence suggests that creative quality can account for up to 50% of campaign effectiveness. Marketing's role is to provide the strategic clarity, brand foundation and consistency that allow creativity to deliver its full commercial potential.

**4. The AI paradox signals a more mature reality.** While belief in AI having a strong impact has increased from 45% to 68%, conviction that its impact will be very strong has fallen from 34% to 11%. This is not a retreat from AI, but a more realistic understanding of what scaled adoption requires. AI is widely expected to improve efficiency, innovation and creative output, but effectiveness still depends on human judgment, brand direction, skills and organisational integration. The CMOs role is to ensure that AI accelerates the brand without diluting what makes it meaningful and different.

**5. Creators are rising, but brand value can be lost in translation.** Creators and influencers already account for 22% of media budgets, and a majority expect investment to increase [61% for creators and 67% for influencers]. Their credibility is high, but confidence in their effectiveness lags behind, since measuring ROI, brand control, and long-term impact uncertainty are the significant barriers. As investment grows, the CMO must provide the brand clarity, guardrails and

measurement needed to ensure creator content builds recognition and lasting brand value, rather than reach and short-term conversion alone.

### What is at stake

Marketing leaders are being cornered into a delivery role, with budgets exposed to the need for immediate return on investment and AI hype pulling investment toward efficiency rather than effectiveness. The money has not disappeared, Dutch net media spend reached a record €6.8 billion in 2025, but it is moving further toward activation that demonstrates short-term returns [return of marketing spend directly related to conversion]. At stake is the pursuit of speed and efficiency that may come at the expense of marketing effectiveness, human judgement and distinctive brand value.

In the long term, without a shared measurement of brand value and genuine board-level alignment, the CMOs authority as steward of sustainable growth erodes, precisely at the moment when brand building and conversion

are converging and require one coherent direction. Three quarters of respondents now agree with the statement that a brand campaign can build the brand and drive sales at the same time. As the boundaries between brand building, conversion and commerce continue to blur, CMOs have an opportunity to play a more active role in orchestrating the end-to-end consumer and shopper journey.

Through the lens of the Blueprint, the fundamentals have not changed; the decisions leaders make around them have. Kantar's 2026 Blueprint update starts from a deceptively simple position: brand still decides who wins. Brands grow by being meaningfully different to more people, such brands command five times the penetration of those that are not. What has changed is the environment in which that difference has to register. AI assistants are now used by 82% of adults globally, and they act as a new kind of influencer: shaping and even deciding what gets discovered, recommended and bought.

The job is no longer only to be meaningful and different in the human mind, but to be recognised and recommended by machines too. As shoppers increasingly search through AI agents and digital platforms, brands will need distinctive positioning supported by clear evidence of functional superiority. Marketing must therefore influence not only what people think and choose, but also the information and recommendations that shape the decisions of shopper agents.

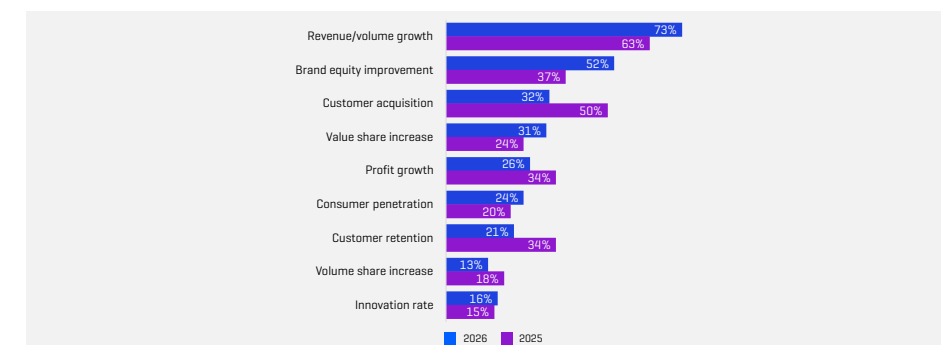
## CHAPTER 1

# Brand is back, but marketers are constantly challenged

Ask a marketing leader what growth means and the first answer is still revenue: 73% place revenue or volume growth in their organisation's top three definitions of marketing-driven growth. What has changed is what sits beside it. Brand equity improvement as an organisational KPI has risen from 37% to 52% in a single year, the largest single movement anywhere in this study. It has overtaken customer

acquisition, which fell from 50% to 32%, and customer retention, which dropped from 34% to 21%. **[Figure 1].**

Strong brand positioning is named by 76% of respondents, up from 63%, and now stands far ahead of everything else, followed by integrated marketing execution at 42% and customer and marketing insight at 41%. Adequate budget has climbed from 20% to 29%:



**Figure 1: How marketing-driven growth is defined within the organisation [2026 vs 2025]**

## Brand is back, but marketers are constantly challenged

leaders increasingly name money itself as a growth driver, which tells something about how constrained they feel. At the bottom of that list sits creative excellence, named by just 12%, ranking seventh of nine.

**[Figure 2].**



**Figure 2: Which of the following do you believe are the top drivers of long-term sustainable growth in marketing? (2026 vs 2025)**

Through the lens of the Blueprint, brand equity is not a soft metric; it is a penetration engine. The Blueprint's growth driver is: be meaningfully different to more people. Brands that achieve it command five times the penetration of those that do not, and a materially higher probability of penetration growth over the following two years. Meaningful

means meeting functional and emotional needs; different means being perceived as different and setting trends in the category, which does not require actual product superiority, and cannot be achieved by distinctive assets alone. When 52% of marketing leaders define growth through brand equity, they are describing exactly this mechanism.

*"For me, building brand equity is about much more than advertising or polished TV commercials. We need to go beyond that. It is rooted in the purpose of your brand and reflected in everything you do - from your culture to the services you provide. Require from everyone in the organisation: How do you genuinely deliver on that promise in your day-to-day work?"*

#### Bas Bisschops

Director Brand, Marketing & Communication, KVK



*"With the market changing and many new competitors entering the automotive sector - particularly Chinese brands, which are expanding very aggressively - brand*

*equity has suddenly become critically important. That is why substantial investments are being made in the brands we work with. There is a clear recognition that if you do not fully leverage the positive emotion surrounding a brand and its relationship with customers, you are missing out on a unique USP and in doing so unnecessarily hurting your business."*

#### Greo Belgers

CMIO, BMW Financial Services



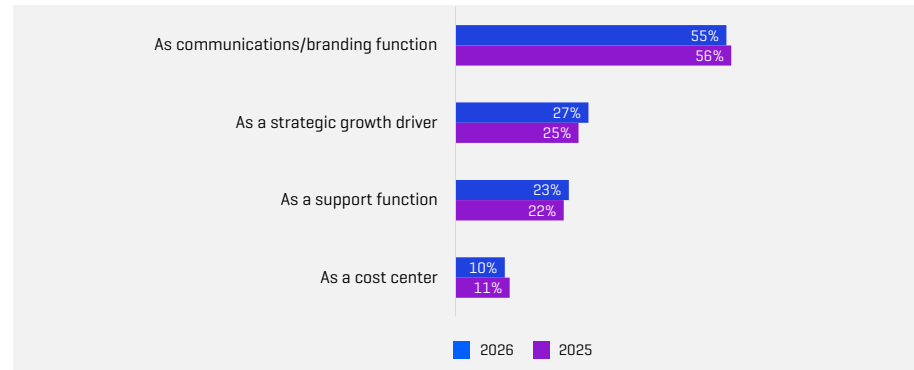
Short-term performance dominates investment decisions, so the funding required to build future demand, pricing power and penetration is repeatedly

## Short and lasting

Most marketing leaders describe a balanced growth strategy, but few experience that balance consistently. While 59% describe their organisation's growth strategy as balancing short- and long-term thinking, the barriers tell a different story. Short-term pressure from executives and shareholders is the number one barrier, named by 56% of respondents, up from 49%.

Together, the first two form the vicious cycle we identified in 2025: silos make it harder to agree on what matters, and misaligned metrics make it harder to break down silos. **[Figure 4).**

One movement deserves attention: lack of clarity on customer needs has fallen



**Figure 3: How non-marketing executives perceive marketing (2026 vs 2025)**

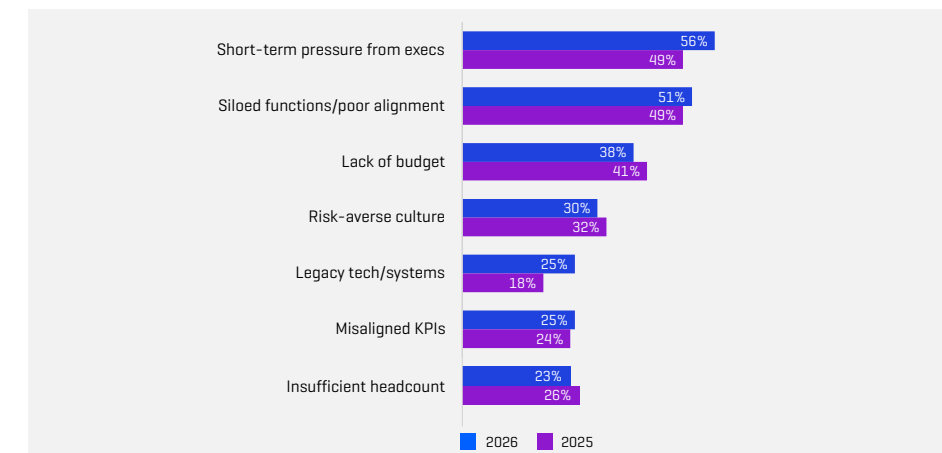
deferred or redirected towards activity with more immediate, measurable returns. Increasingly, that meaning and difference must register not only in the human mind, but in the machine mind too. As AI assistants and LLM-powered search shape what people discover and consider, brand equity will also depend on whether machines can recognise, retrieve and accurately represent what makes a brand meaningful and different. And the source data for the LLMs that power different generative AI and agents differs widely.

The belief gap. A majority of non-marketing executives still see marketing as a communications

and against 56% in 2025. Just 27% see it as a strategic growth driver, and one in ten still sees it as a cost center, almost exactly as many as last year. The 25% to 27% shift shows little progress; it is also, after a year in which brand climbed the agenda everywhere else, a very modest return.

**[Figure 3].**

Marketing has changed its own story faster than it has changed anyone else's mind. The internal narrative has moved to brand; the external perception has not followed. A belief that lives only inside the marketing department is not a strategy, it is a preference.



**Figure 4: Top barriers to marketing-driven growth (2026 vs 2025)**

Siloed functions and poor internal alignment follow at 51%, and lack of budget at 38%.

sharply, the largest decline of any barrier. Marketing leaders are more confident than ever that they understand the consumer. The challenge is turning that understanding into clear growth

opportunities that the organisation can act on.

A better frame emerged from the deep-dive sessions: short and lasting. The problem with “short term versus long term” is that it hands the argument to the short term before it starts: one side is now, the other is later, and later always loses to a quarterly deadline. Replace “long” with “lasting” and the argument changes shape. Lasting activity is not an investment that pays off later; it is the type of activity that pays off now and continues to pay.

*“Perhaps we should frame it not as short and long, but as short and lasting. ‘Long’ suggests that the impact comes later, whereas brand-led activity can deliver today and continue to create value over time.”*

**Alexander Hamilton**  
Head of Brand, Versuni



The alignment problem is underneath. One out of three is not convinced that leadership is fully aligned on what drives growth. Similar proportions doubt that their growth metrics are properly connected rather than siloed, or that marketing controls the key variables influencing those metrics. This is the structural block: a test-and-learn culture cannot survive in an organisation where a third of the leadership team privately disagrees about what growth even is. Every experiment becomes a negotiation. A recurring theme in the sessions was that a clear KPI, tied directly to company objectives, is what earns marketing a position in the boardroom.

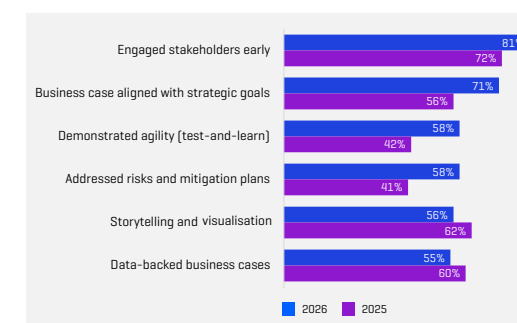
*“The CFO is your best friend - and may know very little about marketing. So, anything you say that sounds like jargon is unlikely to resonate. If it does not generate an immediate return, it can quickly be dismissed as unimportant. That is why you need to bring the CFO along. It is not only about using smart, well-considered terminology, but also about explaining what the advertising will actually achieve. It may sound obvious, but it is often overlooked.”*

**Marcel Ribbens**  
CMO, Figo Pet



What is working. Engaging stakeholders early is now used by 81% of respondents, up from 72%. Building a business case explicitly aligned with strategic

goals has risen from 56% to 71%. Most striking, demonstrated agility through test-and-learn has jumped from 42% to 58%, and addressing risks with mitigation plans from 41% to 58%. Two scores were lower: storytelling and visualisation (62% to 56%) and data-backed business cases (60% to 55%). Marketing leaders are winning arguments by bringing people in early and de-risking the proposal, not by insisting. **[Figure 5].**



**Figure 5: Approaches used to overcome barriers to growth (2026 vs 2025)**

***“The most effective approach is to stay very close to the company strategy. If you can show how marketing contributes to the organisation’s strategic ambitions, the case does not always have to be fully quantitative, but it must be logical and credible. Then start with smaller initiatives, use your budget and demonstrate that they work.”***

**Claire de Nerée**  
Director Marketing &  
Communication, BAM Nederland



Deep-dive participants added a practical refinement: start small and scale. Several described deliberately beginning with modest, visible initiatives to build credibility before asking for anything larger. One summarized the philosophy as

asking forgiveness rather than permission. Another emphasized tying the marketing strategy directly to stated company ambitions, so that declining the marketing plan means declining the corporate plan.

***“Sometimes it can be better to ask for forgiveness than for permission. Start, demonstrate that it delivers value and use that evidence to build support. But when you want to scale and secure significant investment, you still need alignment, and the question inevitably returns: what will this deliver in the current financial year?”***

**Alexander Hamilton**  
Head of Brand, Versuni



The market context: the money is there. The Dutch advertising

market is not shrinking, it is growing, and has been for five consecutive years. Net media spend reached a record €6.8 billion in 2025, up 6.1%. What has changed is where it goes. Digital now accounts for almost 63% of all net media spend, up from 39% a decade ago, and grew 10% in 2025 alone. Television declined 5%, its third consecutive fall. Magazines fell 9%, newspapers 6%. Out of home grew 8% and is – next to digital – the only medium to have increased its market share over the past 10 years. Source: Nielsen, Jaarrapport Netto Mediabestedingen 2025 [published May 2026].

The budget has not disappeared. It has migrated toward whatever can be measured fastest. That is the short-versus-lasting problem expressed as a spreadsheet: measurability, not true but less tangible merit, is driving allocation. This makes the ability to demonstrate brand value the precondition for getting more of that €6.8 billion budgeted for long-term growth.

Through the lens of the Blueprint, predisposition is what makes the

short term possible. Brands that people are strongly predisposed to have nine times the volume share, command twice the price, and are four times more likely to grow value share than brands with weaker predisposition. Pricing power is not a brand-team indulgence; in margin-constricted times it is one of the few levers that protects profit. Kantar’s work with Google shows that brands with high Future Power, the likelihood of growing in the next twelve months, tend to outperform the market. A meaningful difference is inextricably connected to revenue and margin. That is a CFO conversation, not a marketing one.

## CHAPTER 3

# The market of sameness

*"We tend to reduce the sameness debate to communication. To me, that is hygiene. Everyone may present an authentic story externally, but when I take out an insurance policy, the process is still the same everywhere."*

**Bas Bisschops**

Director Brand, Marketing & Communication, KVK

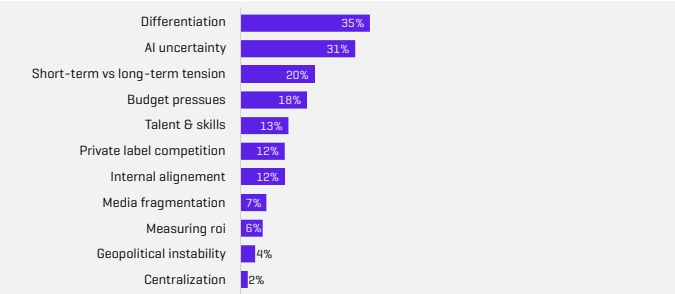


We gave marketing leaders an open question and asked what worries them most. Thirty-five percent raised the topic of differentiation: the difficulty of standing out in crowded, fragmented markets, making it the most frequently voiced

concern in the study, just ahead of AI uncertainty at 31%. The short-versus-lasting tension followed at 20%, and budget pressure at 18%. **[Figure 6].**

In our sessions, this fear got more context. Leaders described categories being reshaped by strong new entrants, Asian brands moving quickly into European markets, private label competing on both price and quality, alongside a fragmented media landscape in which no single channel builds recognition the way it once did. Add generative AI producing competent, on-brief, entirely forgettable work at scale, and the risk is a market where everything feels generic and nothing is memorable.

Authenticity, not purpose. Asked what protects a brand in a market of sameness, leaders did not reach for purpose in the campaigning sense. They looked



**Figure 6: What worries marketing leaders most (spontaneous, open responses)**

for authenticity, and drew a clear distinction. Purpose has come to mean generating an additional societal effect alongside the business. Authenticity asks a narrower and harder question: what do you actually stand for, and does everything you do reflect it? This has a practical consequence when so much brand communication is being handed to third parties: if creators, influencers and increasingly AI systems are describing your brand to the world, your own definition of that brand has to be sharper than ever, because it is now the brief for everyone else.

*"It is really about returning to the core of what your brand stands for - to its fundamental strength. That is where the brand's*

*greatest value lies. I know purpose marketing was, for a while, seen as something of a hype, but I do not believe purpose marketing has disappeared. You have to return to the original reason behind your story. If you remain consistent and radically transparent about that, it becomes a genuine source of differentiation. Perhaps the time has truly come for radical authenticity."*

**Greo Belgers**

CMIO, BMW Financial Services



*"With the rapid rise of SEO and LLMs, I find myself thinking much more carefully about what our brand should be known for and how we can bring that consistently to the forefront."*

**Claire de Nerée**  
Director Marketing &  
Communication, BAM Nederland



Two practitioner routes emerged repeatedly. The first is depth: carrying the brand promise beyond communication into the service itself, one participant described putting the brand promise on a single sheet of paper and taking all 2,000 colleagues through a brand program asking how they deliver it in their daily work. The second is integration: bringing media and creative forward together rather than

producing a concept and placing it afterwards.

*"Strong campaigns can continue to work for years, yet as marketers we are often tempted to change them again. Considerable time and money go into moving the work a few degrees to the left or right, when consistency frequently creates far greater value."*

**Baukje ter Huurne**  
CMO, NOC\*NSF



Not every category needs radical difference. In sectors defined by large public commissions, consistent presence can matter more than distinctiveness, though creative standout still buys easier entry.

*"Previously, you could optimise tactical activity, invest heavily in brand building and add some online video, and you were well on your way. That approach is no longer sufficient. Media and creativity now need to work together across the full campaign."*

**Ferdinand Schilder**  
Digital Marketing Strategist,  
Centraal Beheer



How do marketing leaders say they safeguard creative excellence? The right partners (39%) and a strong brand foundation (37%) lead comfortably. Both are, in different ways, about setting things up correctly and then trusting the arranged environment. Building the internal muscle comes lower: measurement focus at 24%, a

test-and-learn culture at 22% and team development at 21%. This suggests that marketing leaders currently place greater emphasis on external partners and strong brand foundations than on building the internal capability to test, learn and continually improve creative work.

**[Figure 7].**

*"In our market, it is less about being radically different and more about being consistently present with a strong story that builds reputation. Creative standout still matters, because it makes it easier for that story to be noticed."*

**Claire de Nerée**  
Director Marketing &  
Communication, BAM Nederland



Through the lens of the Blueprint, difference is perceived, not produced, and culture amplifies it. Different means being perceived as different and setting trends relative to competitors. It does not require product superiority, and distinctive assets alone are not enough to create a difference.

That is what makes creative excellence strategic rather than

decorative. The 2026 update adds a route many brands under-use: cultural vibrancy. Brands that are visionary, inspiring, bold and exciting are 48% more meaningful and 79% more different relative to their size. Connecting with culture means letting go of some control, but it predisposes more people. For a profession whose greatest fear is sameness, that is a trade worth making consciously.

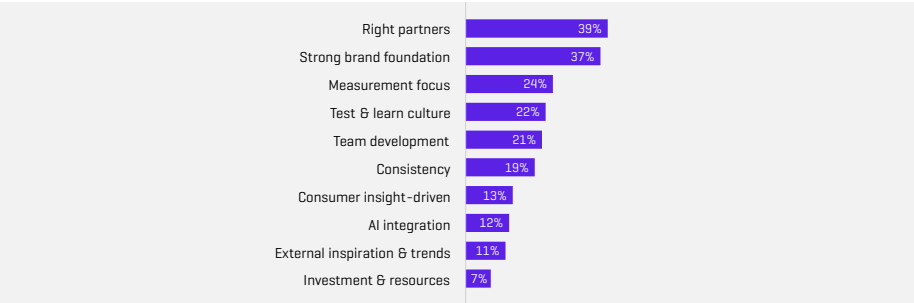


Figure 7: How marketing leaders say they safeguard creative excellence [spontaneous, open responses]

CHAPTER 4

# The AI paradox

Last year, 72% of marketing leaders told us digital transformation and AI would have the greatest impact on marketing growth over the following 3-5 years. It was the clearest consensus in the 2025 study. Twelve months of practical experience later, the belief has not disappeared, it has matured. Belief in AI's strong impact on growth over the next three to five years has risen sharply, from 45% to 68%. But conviction in a very

strong impact has fallen just as sharply, from 34% to 11%. More people now believe AI matters; far fewer believe it changes everything. AI is seen as an accelerant for innovation and creative output, not yet a proven growth engine. **[Figure 8].** It may also indicate that we have reached a point of stagnation within the current marketing organisation settings. We need further in-depth understanding of what is happening here.

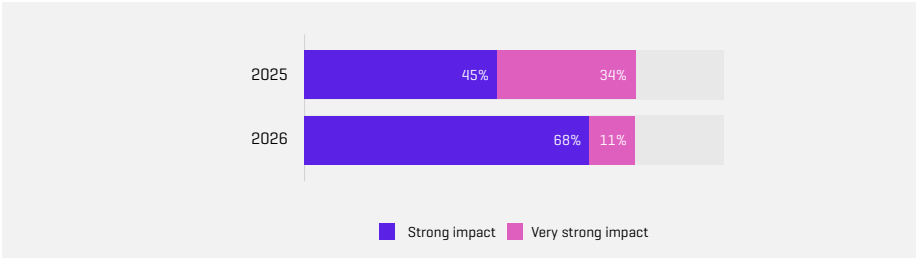
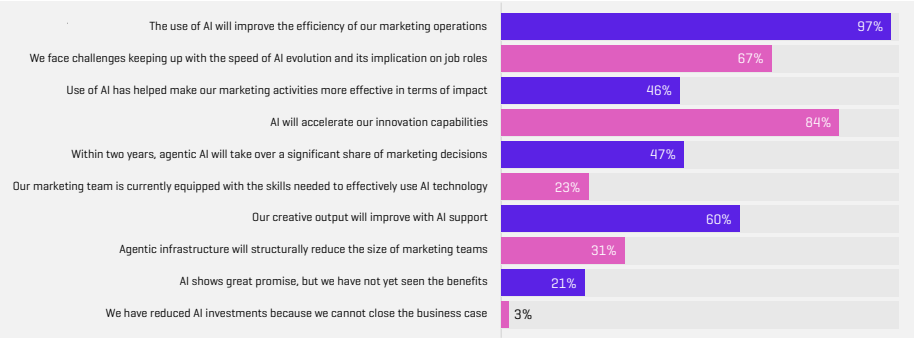


Figure 8: Given everything you know about the impact of AI, how strongly do you believe that AI will amplify the growth of your organisation within the next 3 to 5 years (2026 vs 2025)



**Figure 9: To what extent do you agree with the following statements on the impact of AI in marketing over the next 12-24 months?**

**The gap between efficiency and effectiveness.** Virtually everyone, 97%, expects AI to improve the efficiency of their marketing operations, and 84% expect it to accelerate innovation. But when the question turns from expectation to experience, the numbers are far lower. Only 46% say AI has actually made their marketing more effective in terms of impact, and only 23% say their team currently has the skills to use it effectively. That is the paradox in one line. **[Figure 9].**

*“Still, you need a human to help you forecast and make the final decision because you’re still in the driver’s seat. But I believe AI*

*can tremendously help make all the analytical work much easier, and therefore it’ll be easier and faster to make a decision because of the combination of speed and clarity AI can bring.”*

**Caroline Hoefsloot**  
Director Marketing and Communications, FastNed



This is reflected in the honest self-assessment during our deep-dive sessions. Participants

described their organisations’ AI adoption with a memorable phrase: still in kindergarten. Experimentation is everywhere; structural, large-scale integration into processes is rare, held back by time, capacity, budget and the sheer complexity of changing how work is done. Legal review and data quality add further friction, particularly in larger organisations. Encouragingly, the stated focus is on effectiveness, doing new things, rather than efficiency alone.

*“In all honesty, we are still in kindergarten when it comes to AI. I am exploring how to capture its potential while protecting the authenticity we must continue to deliver through the brand. That balance is not straightforward.”*

**Baukje ter Huurne**  
CMO, NOC\*NSF



When we pressed on what is actually blocking progress, the answer was neither the technology nor the legal setting:

*“The biggest challenge is not the technology or the legal framework. It is creating the process, capacity and headspace required to change how the work is actually done.”*

**Ferdinand Schilder**  
Digital Marketing Strategist, Centraal Beheer



What then is tempering expectations? Around a third spontaneously identified AI-related uncertainty as a major concern. Their responses centered on the speed of change, maintaining human and creative oversight, and the need to translate efficiency into genuine

marketing effectiveness. The deep-dive sessions added a further layer: organizations are discovering that moving from individual experimentation to scaled adoption requires time, new skills, better data and changes to established processes.

And then the number that should settle the efficiency-versus-effectiveness debate. In Kantar's LINK database, AI-generated advertising scores on average lower on impact than advertising made without it, the 54th percentile against the 65th. Some AI campaigns perform strongly so there is proof it can be very impactful. However, the full quality potential of AI-generated content is on average perceived as lower these days. One further risk deserves naming: bias. Generative systems reproduce what already exists, including its prejudices, and by combining sources, they can amplify rather than dilute them. Participants noted the parallel with filter bubbles. Any organization putting AI near consumer-facing creative needs a review framework with named owners and defined checkpoints, not good intentions. Kantar and

Affectiva-iMotions research suggests the story is more nuanced than whether AI-made advertising is better or worse. Ads where GenAI is used seamlessly can perform strongly, including on branded cut-through, but work that clearly feels AI-generated risks lower branding and lower net positivity, reflecting the familiar "uncanny valley" effect. The practical implication is to use AI as a creative accelerator, while keeping human judgement, brand fit and emotional response testing firmly in the loop.

Through the lens of the Blueprint, AI does not replace the fundamentals, it rewrites how you play them. 82% of adults globally have used an AI assistant in the past six months; these assistants are the new marketing influencers, shaping recommendations, content and choices. In one travel-sector study, AI assistants and AI search combined already influenced brand predisposition more than traditional search. But visibility alone is not the goal, AI visibility is not always positive. Salience gets you noticed; meaningful difference earns you the praise.

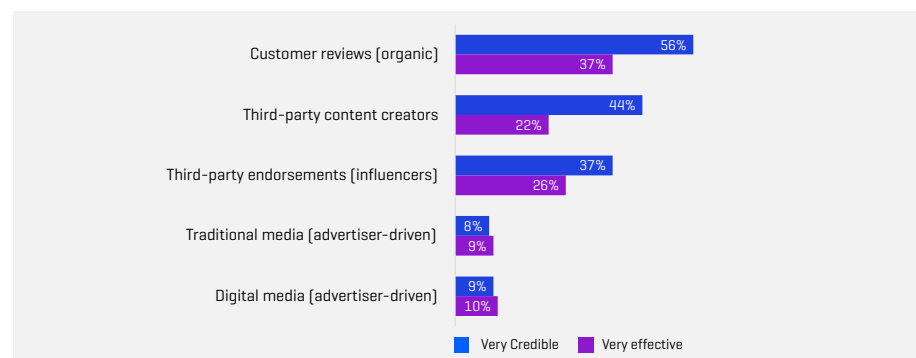
If what is specific and valued about your brand is not where AI answers are sourced, the model defaults to neutral or adds caveats. The practical question for every CMO: you have a team for search optimisation, do you have one for how your brand appears in AI answers?

## CHAPTER 5

# Trust ahead of control

This is the newest territory in the study, and the one where stated belief and actual behaviour diverge most sharply. Organic customer reviews lead on high credibility at 56%, followed by third-party content creators at 44% and influencer endorsements at 37%, all ahead of advertiser-driven digital and traditional media. But look at the gaps: for reviews and for content creators,

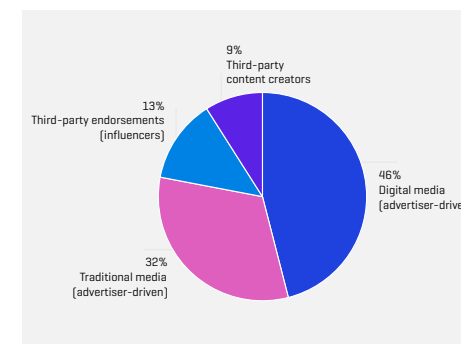
credibility runs 15 points ahead of effectiveness, while for advertiser-driven media the two are at equal level. The less control marketers have over a source, the less able they are to confirm that it works. Creators amplify a brand; they cannot be the brand. This is not a judgement about creators. It is a confession about measurement. **[Figure 10].**



**Figure 10:** How credible and how effective are these forms of influence for building your brand?

When asked, CMOs indicate that 22% of their media budget today is spent on content creators [9%] and influencers [13%]. Digital media takes 46% and traditional media 32%. The money has not yet followed the belief. Intent, however, points firmly in one direction: 67% expect to increase spend on influencer endorsements and 61% on content creators, while 44% expect to spend less on traditional media, the only category where reducing spend is the most common answer.

**[Figures 11 and 12].**

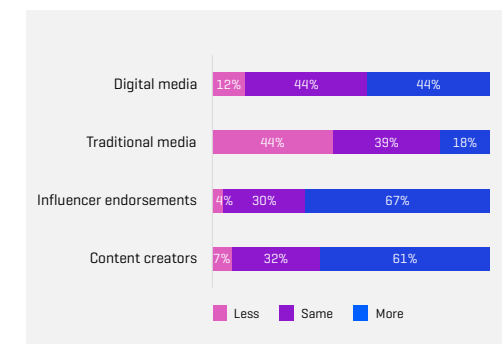


**Figure 11:** Current media budget allocation

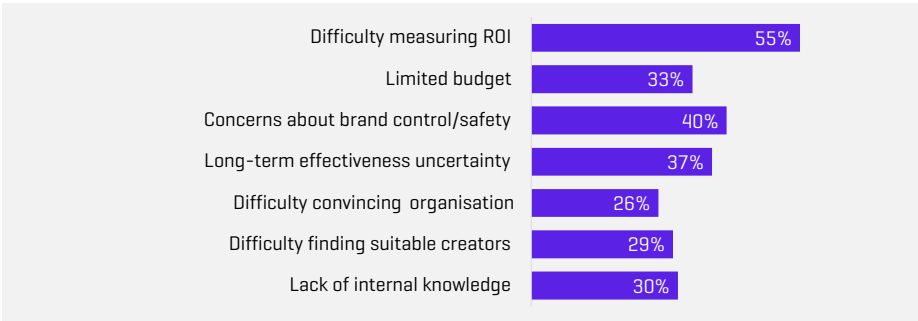
What is holding them back. Unlike the broader growth agenda, where only 16% cite measuring impact as a major challenge (see figure

4), proving ROI remains the single biggest barrier to greater use of creators and influencers, cited as a large barrier by 55% and as some form of barrier by 93%. But the two next barriers indicate the real issues: concerns over brand control and safety, a large barrier for 40%, and uncertainty about long-term effectiveness, a large barrier for 37% and some form of barrier for 91%. Two in five marketing leaders experience significant difficulty protecting the brand itself.

**[Figure 13].**



**Figure 12:** Expected budget changes over the next 12-24 months

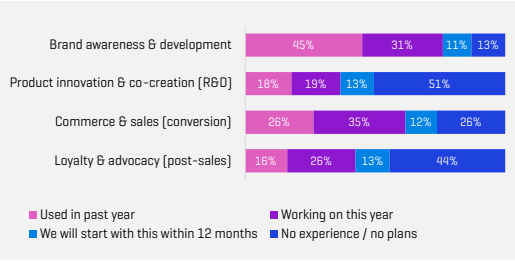


**Figure 13: Barriers to working with content creators and influencers (share naming it a large barrier)**

Creator work started in brand awareness and brand building, where 45% have used it in the past year, and is now moving into conversion, 26% have used it, and a further 35% are working on it this year. But innovation and post-sales loyalty are largely untouched: around half report no experience and no plans in either. And 44% of marketing leaders say their organisation is behind competitors in its use of content creators. Creator relationships are often managed at campaign level, potentially overlooking their longer-term value to the brand. **(Figure 14).**

**Figure 14: In which phases of the customer journey does your organisation use content creators, now and in the next 12 months?**

The definitional problem remains unresolved. Participants drew a useful distinction between creators who primarily produce content and influencers who primarily activate audiences or drive sales. However, they also acknowledged that the roles frequently overlap. What matters operationally is to define the role, objective, creative freedom and KPIs for each partnership, rather than treating all creator activity as one discipline.



*“The industry regularly creates new language for familiar roles. There is a useful distinction: an influencer primarily activates an audience or supports sales, while a content creator primarily creates content in which the brand appears. But the dividing line is thin, and in practice the roles often overlap.”*



**Baukje ter Huurne**  
CMO, NOC\*NSF

Where creators are working well, participants described the same recipe: use them to reach specific audiences, usually younger ones, otherwise extremely hard to reach, and grant genuine creative freedom within clear brand guardrails.

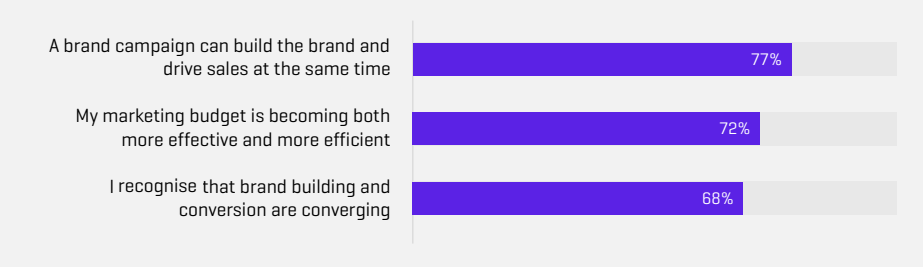
Is a creator-led strategy sustainable?

Our sessions did not reach consensus, and the disagreement is helpful for any further discussion. Participants pointed to brands built almost entirely through creators and social platforms, and asked whether that model builds anything lasting or simply rents attention. The counter-argument was equally sharp: those brands move fast precisely because they carry less internal alignment overhead, but they also carry less brand. A useful conclusion: the challengers operate opportunistically, the established brands operate conservatively and often reactively, and the winner will be whoever takes the best of both, the speed of the former, the brand discipline of the latter.

Through the lens of the Blueprint, creators amplify your brand, but only 27% of creator content links effectively back to it. Working with creators means buying their equity and their trust while giving up some control. A net 61% of marketers globally plan to increase creator investment in 2026, which matches our own findings almost exactly. Your reason for being and difference

are becoming more important, not less, because they are the foundation of the creator’s content and the source of their brief. Meanwhile the Blueprint’s second accelerator, be more present, is being rewritten by agentic commerce: brands that are always present attract seven times more buyers than those present on half of buying occasions, and category entry points are moving upstream, they now appear as prompts, not shelf tags. Sources: Kantar, Blueprint for Brand Growth, the 2026 edit; Kantar Media Reactions, Context Lab.

Convergence is already reality. 77% now agree that a brand campaign can build the brand and drive sales at the same time; 72% say their marketing budget is becoming both more effective and more efficient; and 68% recognise that brand building and conversion are converging. This is the practical end of the short-versus-lasting debate: if the same activity does both, then arguing about which one to fund is arguing about nothing. What it does require is that someone owns both outcomes. **[Figure 15].**



**Figure 15: To what extent do you agree: brand building and conversion are converging**

CHAPTER 6

# Guardian of brand value

There is a pattern running through this year’s findings that is easy to miss because every individual instance sounds so reasonable. Marketing leaders recognise what matters. They describe the problem accurately. And then, very often, they wait. They know brand drives growth, but find it difficult to prove it in the board’s currency. They fear sameness, and rate creative excellence only seventh out of nine. They know AI adoption is immature, but many have yet to translate experimentation into an operating model with clear priorities, ownership and investment. They believe creators are credible, but do admit they are behind.

We flagged a similar risk last year: marketing casting itself as the perpetual underdog, a function that remains misunderstood. A year on, that defensive narrative persists. It is time to stop repeating the complaint and start building the authority to change

the perception.

A role, not a complaint. The most useful idea to come out of this year’s work is not a statistic. It is a **job description**. Across our sessions, leaders kept circling the same conclusion: doing this properly requires organising differently. Not simply using more AI, but creating roles whose explicit purpose is to protect and direct the brand across an environment the brand no longer fully controls, across creators, across platforms, across AI-generated answers. Several participants recognised the role immediately in their own work. One described herself, simply, as the Brand Guardian.

The stronger frame is not simply “CMO under pressure”, nor is it to redefine the CMO solely as Brand Guardian. The role is becoming one of orchestration: directing an increasingly distributed marketing system across people, AI,

creators, platforms and commercial functions. This requires the CMO to move beyond being the organisation's leading marketing expert and become the leader who designs how marketing creates value. Guarding brand value is a critical part of that role, ensuring that short-term conversion strengthens rather than spends the long-term asset. But the larger challenge is readiness: many marketing leaders recognise how quickly the role is changing without yet having the mandate, capabilities or operating model to lead it.

What the Guardian actually guards: meaning and difference, in both the human mind and the machine mind; pricing power, the most direct financial expression of brand strength; consistency, across the full customer experience, not just communication; brand safety, wherever the brand is described by someone else; and the evidence, because an asset nobody can measure will eventually be spent.

## Five moves that matter

### 1. Build a brand-value measurement framework, and put it in the board's currency.

Link equity to financial outcomes: penetration, pricing power, revenue. The Blueprint provides the connective tissue, strongly predisposed brands hold nine times the volume share, command twice the price and are four times more likely to grow value share; brands with high Future Power outperform the market. Stop presenting brand health as a marketing report. Present it as a forecast of margin. Addresses: the wider challenge of translating brand equity into financial outcomes the board can recognise.

**2. Engage the C-suite early and codify a shared short-and-lasting scorecard.** This is already the most widely used approach in the study: 81% now engage stakeholders early. Formalise it: one agreed metric hierarchy, connecting end goals to the underlying measures, signed by finance as well as marketing. Addresses: the one in three CMOs who doubt that leadership is aligned on what drives growth.

### 3. Institutionalise test-and-learn, with the risk case written up front.

Test-and-learn rose from 42% to 58% this year, and addressing risks with mitigation plans rose from 41% to 58%. Together, these shifts suggest that marketers are increasingly combining experimentation with a clearer articulation of risk. Make the risk case a standing part of every proposal, and the experimentation budget a standing line rather than a negotiation. Addresses: risk-averse culture [30%] and hesitancy on both AI and creators.

### 4. Make AI the foundation of the marketing operating model.

The next step is not to add more AI tools to the existing organisation, but to redesign marketing around what AI makes possible. The CMO must lead that transformation: define where AI drives insight, decisions, creation and execution, then organise human judgement, creativity and brand stewardship around it. Nearly all expect AI to improve efficiency, yet only 46% say it has already improved marketing effectiveness and only 23% say their teams currently have the skills to use it well.

Assign clear ownership and build checkpoints for brand safety, human oversight, bias and data quality. Addresses: the 31% who spontaneously name AI uncertainty as a fear, and the gap between experimentation and scaled adoption.

### 5. Set the brand guardrails before you hand over the brand.

A majority intend to spend more, 61% on creators, 67% on influencers, while two in five cite brand control and safety as a large barrier. Separate creators from influencers with distinct definitions and KPIs. Set brand guidelines, approval rights and partner vetting for brand fit. Track long-term brand health, not just short-term reach. Only 27% of creator content links effectively back to the brand, which is a briefing problem you can solve. Know your brand before you hand it over, and guide creators clearly on what must remain fixed and where they have freedom.

## Our closing statement

The fundamentals of brand growth have not changed. The decisions leaders make around them have.

Last year we wrote that marketing is not just a function, it is a force, and that the most effective CMOs are not waiting for permission to lead. This year the data gives that claim something firmer to stand on. Brand has returned to the centre of how marketing leaders define growth. Brand building and conversion are converging, more than two thirds of leaders can see it. The evidence connecting meaningful difference to penetration, pricing power and market outperformance has never been more robust.

What has not arrived is the authority. And authority is not granted by a reorganisation or a job title. It is accumulated, through proof the board recognises, alignment built before

the meeting rather than during it, and the visible willingness to experiment and be judged on the result.

Kantar's view. The 2026 data marks a genuine inflection: brand is once again the growth story CMOs want to tell. The winners will be those who arm that belief with proof, alignment and disciplined experimentation, turning the CMO from a defender of budgets into the organisation's authoritative guardian of brand-led growth.

So the question we leave you with is not whether brand matters. You have already answered that. It is this: if CMOs now recognise the value of brand, how will they claim the authority to protect it, prove it and turn it into growth?

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# Colophon

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