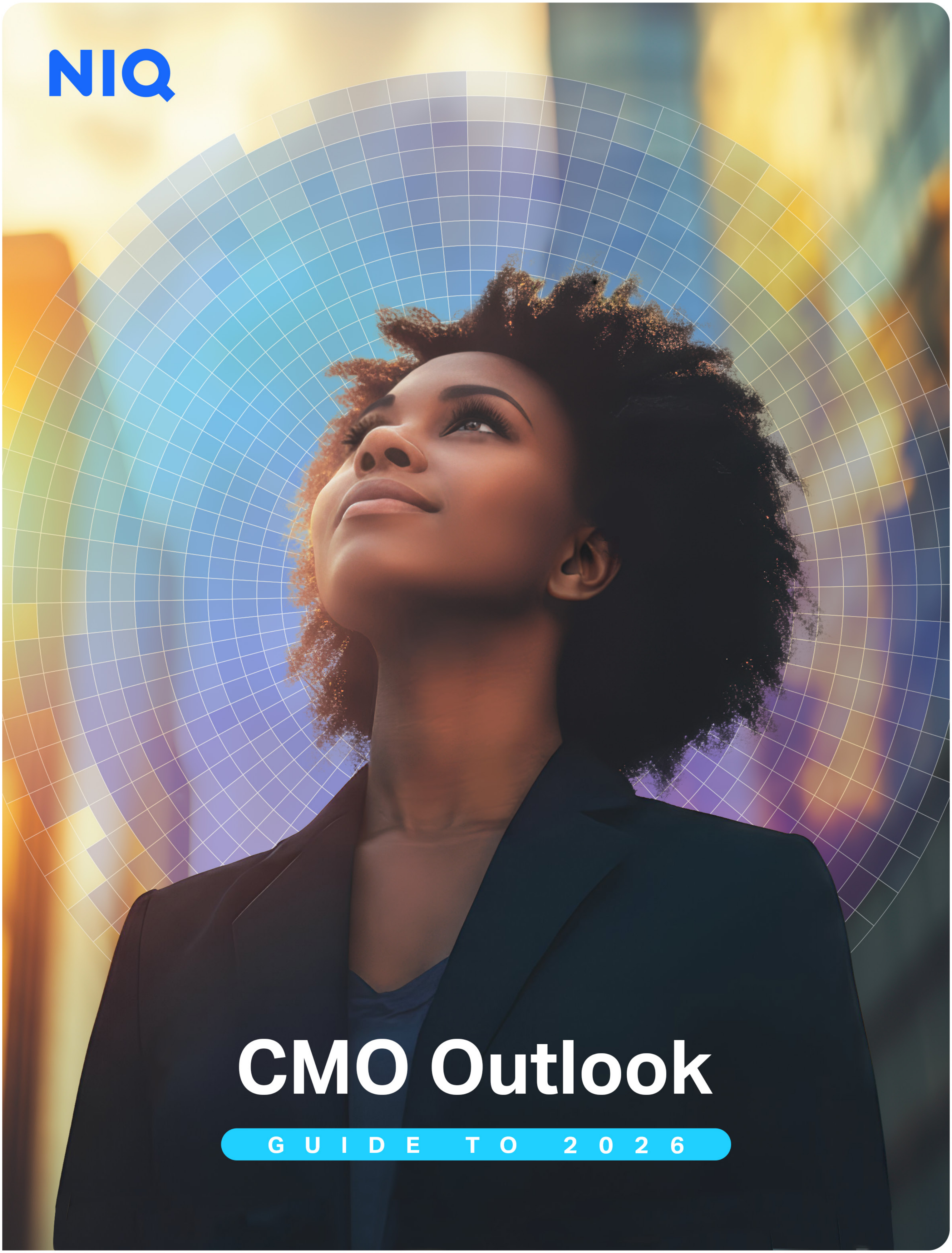


CMO Outlook

GUIDE TO 2026

A welcome *from Marta Cyhan-Bowles*

We've recently had an incredible opportunity to speak directly with chief marketing officers (CMOs) across industries about the challenges shaping their world. What struck me most is how universal these challenges are—whether it's navigating fragmented data, proving return on investment (ROI) under tighter budgets, or integrating artificial intelligence (AI) in ways that deliver real business value.

Despite the complexities, one theme stood out: resilience. CMOs are drawing on creativity and business acumen to solve problems that have no easy answers. They're balancing short-term performance with long-term brand building, finding clarity in a sea of data, and leading their organizations through disruption with confidence and purpose.

This year's *CMO Outlook: Guide to 2026* reflects those conversations and the survey feedback from other senior marketing leaders across the globe. It offers insights into the contradictions they're grappling with and provides actionable strategies to turn these challenges into opportunities.

As you read, I hope you find inspiration and practical guidance to help you lead with confidence in the year ahead.

Marta Cyhan-Bowles
Chief Communications Officer &
Head of Global Marketing COE, NIQ

© 2025 Nielsen Consumer LLC. All rights reserved.

Table of Contents

Click on the contents to navigate

© 2025 Nielsen Consumer LLC. All rights reserved.

1
The crossroads

If the last decade has been defined by disruption, 2025 has only deepened the trend. CMOs are contending with a fresh wave of uncertainty, punctuated by shifting trade policies, geopolitical unrest, and the looming threat of an economic slowdown—driving them to recalibrate strategies in real time.

© 2025 Nielsen Consumer LLC. All rights reserved.

Consumers have also adapted to a "new normal" once again, with caution becoming the default. Shoppers are more selective and demanding of brands as they seek to maximize their budgets while anticipating the next disruption. This shift has placed sustained pressure on organizations to create a precise balance of value, trust, and quality. **Marketing leaders find themselves at the center of this equation, tasked with delivering results in an environment in which expectations are high and resources are tight**.

Every marketing dollar is now under the microscope. With organizations seeking cost reductions and marketing budgets often in the crosshairs for cuts, CMOs are in the critical position of demonstrating their strategic value in driving awareness and growth while delivering lasting brand loyalty. They must do more than spend wisely; they must **prove impact**.

The pressure is palpable: **74% of CMOs say they're under more scrutiny to prove marketing ROI.** Yet at the same time, **only 34% say they must work harder than other business functions to secure budget, and only 38% feel their brand is more affected by today's economic environment than their competitors—suggesting a shared understanding that the present challenges are universal**.

Further complicating the picture is an explosion of data: With more information at their fingertips than ever before—and the expanding mix of off-platform (social, programmatic) and on-platform (retail media networks, or RMNs) channels adding to the complexity—marketing leaders are tasked with integrating fragmented data sources into a singular, actionable view that delivers cross-functional value and optimizes investments toward the channels that perform best.

> ***"Gone are the days where allocation of budget is based on judgment. It's much more fact-based, and every single dollar is interrogated much more than it ever used to be."***
>
> *—Mark Cooper, Global SVP, Marketing Operations and Portfolio Management,* ***Coty***

Are they rising to the challenge?

© 2025 Nielsen Consumer LLC. All rights reserved.

Data, decisions, and the drive for ROI

To answer that question, NIQ surveyed more than 250 CMOs and senior marketing decision-makers from influential companies across regions, industries, and organizational sizes—gaining insight into how they're:

- adapting to consumer behavioral shifts
- navigating performance measurement and marketing return on investment (ROI)/ return on ad spend (ROAS)
- managing increasingly complex channel ecosystems with leaner teams
- evaluating AI integration to drive more efficiencies

Drawing on insights from survey responses and qualitative interviews, we found that **marketing leaders are navigating a landscape full of contradictions**.

- **CMOs are confident but have little margin for error**. Despite headwinds, CMOs say they are optimistic about growth. But with pervasive budget reductions, their confidence is tempered by a mandate from peers and senior leaders to make every dollar count—and to prove that they delivered. This has resulted in a strong push toward digital, but omnichannel is also a must.

- **CMOs have no shortage of data but lack full connectivity**. The proliferation of media channels has created unprecedented opportunities to engage with consumers, but walled gardens, privacy regulations, and disconnected platforms have exacerbated data fragmentation—the primary barrier CMOs attribute to keeping them from maximizing the potential of insights and translating it to teams, colleagues, and senior leadership.

- **CMOs are confronting a growing tension: Defend and grow brand position or seek the most efficient conversion.** With consumers demanding more value and private label pressure increasing, it has never been more important for brands to defend their premium position. Yet there is growing pressure for CMOs to allocate their budgets to the bottom of the funnel, risking long-term brand equity.

- **CMOs must prove they're AI innovators—when the technology has been in their stacks for years**. AI has long been quietly powering marketing optimization, targeting, and automation. But CMOs are now under increased pressure to demonstrate usage and impact. The next frontier isn't AI adoption per se; it's making strategic investments in AI that augment their current marketing tech stack, accelerate insights, and directly connect to ROI.

As leaders navigate these collective challenges, NIQ's *CMO Outlook*: *Guide to 2026* serves as a strategic compass—providing clarity, benchmarks, and foresight to guide smarter investment decisions and unlock growth in the coming year and beyond.

© 2025 Nielsen Consumer LLC. All rights reserved.

2
When brand value meets growth pressure

In this increasingly complex landscape, CMOs' contributions to both brand and volume growth are often the clearest signal of whether their strategy is working. With consumers scrutinizing prices and claims in search of value *and* quality—and with private label continuing to maintain its elevated share—marketing teams are retooling everything from claims on pack to promotional and channel strategies, all while weighing how to maximize engagement.

© 2025 Nielsen Consumer LLC. All rights reserved.

This complexity is reflected in how CMOs feel about their brands: **Last year, 83% expressed confidence in their brand's mission and purpose beyond commercial goals. This year, that number has dropped to 71%.**

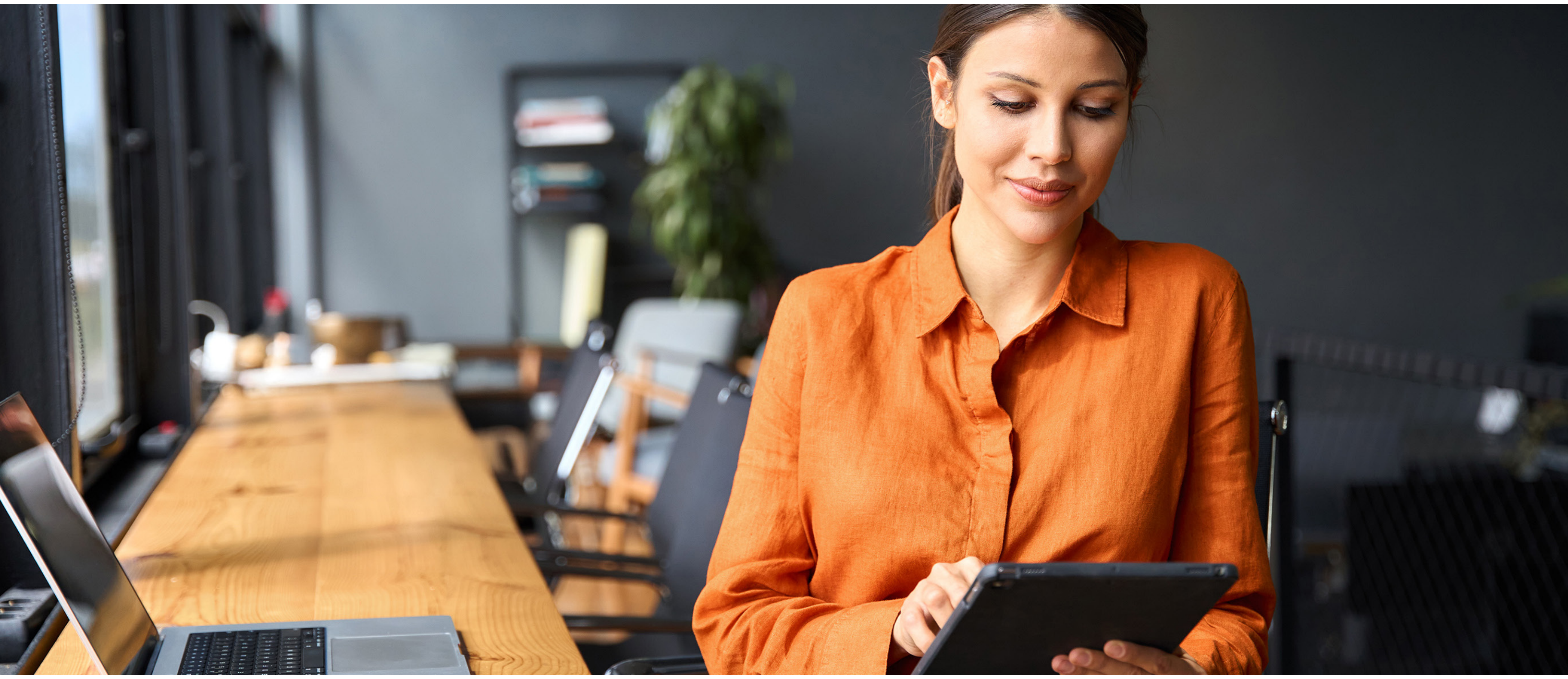
Part of this decline likely stems from the external pressures CMOs are facing. But survey data also strongly suggests an internal tension might be growing between CMOs and their executive counterparts when it comes to long-term brand investment: **69%** of CMOs say their CEO and chief financial officer (CFO) believe in the value of long-term brand building—down sharply from 80% last year. And when we asked about their budget allocation between long- and short-term goals, only **55%** said they were allocating 60% or more to long-term brand-building—down slightly from last year's 59%.

Yet amid declining confidence, CMOs appear to be rising to the challenge. Despite the percentage dip of leaders who say company performance has grown over the past three years (down from 70% to **61%**), their outlook for future growth remains steady, at **75%**. This optimism suggests a shift in mindset similar to that of consumers: Disruption isn't a temporary condition; it's the new operating environment.

There's also resilience in the numbers. A strong majority—**83%**—continue to view their brand as a commercial asset, consistent with last year's findings. That confidence, even amid uncertainty, suggests that while strategies may be in flux, the foundational equity built over time is still delivering value—at least for now.

83%

of CMOs continue to view their brand as a commercial asset that is delivering value



© 2025 Nielsen Consumer LLC. All rights reserved.

Value, visibility, and the new rules of loyalty

- NIQ's Expanded Omnishopper US data shows that private label (**+5.5%**) and national brands (**+6%**) are growing at similar rates compared with last year, **but national brands still lead in revenue per occasion—earning more than twice as much per occasion** (**$31.60** per occasion, compared with **$14.90** per occasion for private labels).

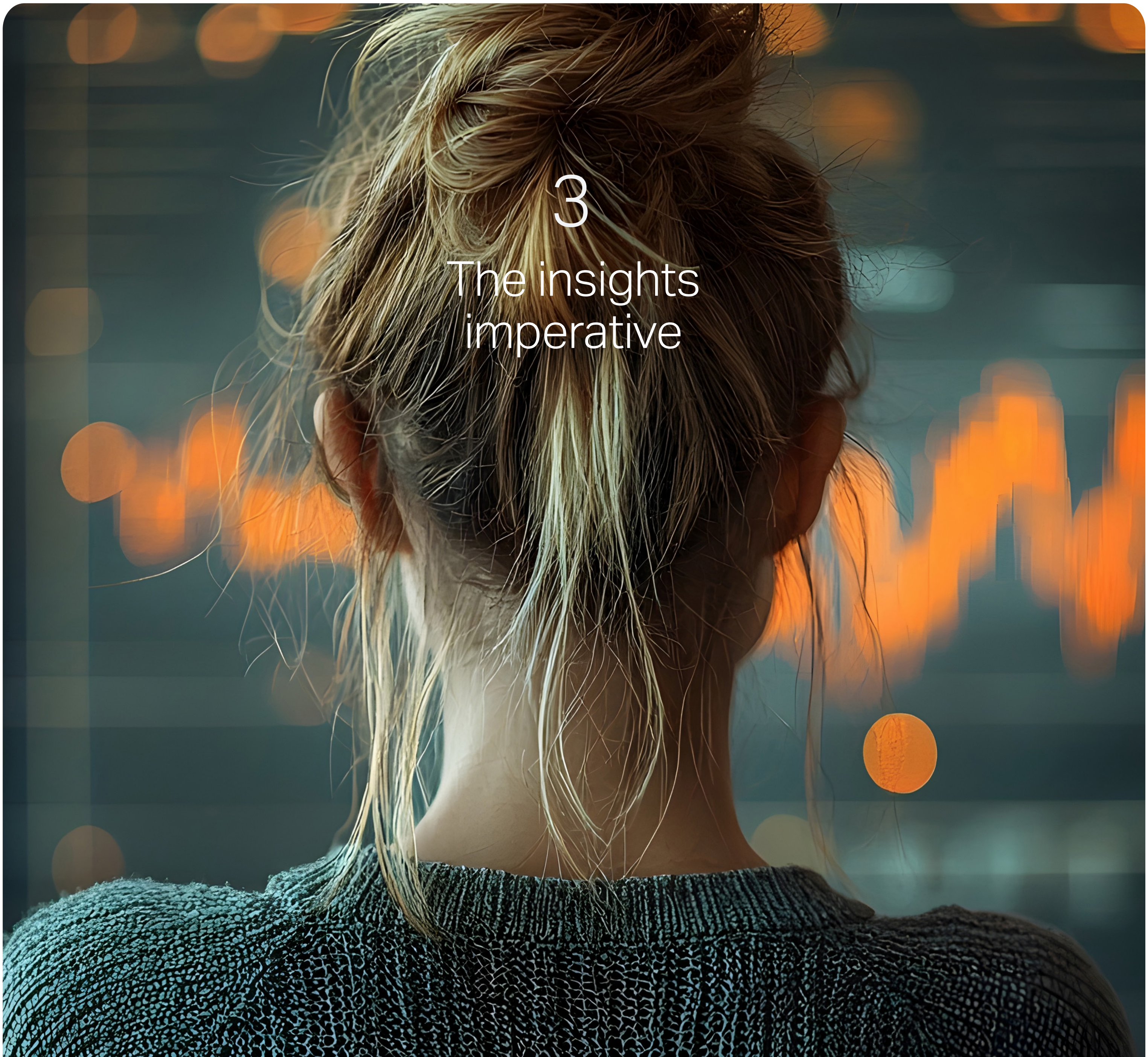
- **Brand loyalty is still possible for brands that deliver compelling value**. Still, price will always remain a key variable in that equation, with only 12% of global consumers in our recent Consumer Outlook survey saying they'd stick to their regular brand regardless of cost. **This means CMOs must demonstrate what makes their offerings valuable to retain that loyalty**.

- Discovery and purchase are increasingly omni, with shoppers moving among social platforms, search engines, messaging apps, retail media networks, and stores. This fluidity changes how brands must think about visibility and conversion. **However, NIQ's Expanded Omnishopper US data shows that nearly three-quarters of FMCG sales still occur offline, with household spend almost three times higher in physical retail than online**. This is counterbalanced, however, by the fact that across many categories, purchasing occasions tend to be higher across digital shelves than in-store. **To capture this potential, CMOs must deliver a seamless cross-channel experience to meet shoppers where they prefer to engage**.

Key takeaways

Brands aren't in crisis—but they could be approaching a crossroads. As pressure mounts to deliver more with less, the ability to articulate and defend the strategic importance of a full-funnel marketing strategy to build brands will be more critical than ever.

© 2025 Nielsen Consumer LLC. All rights reserved.



3
The insights imperative

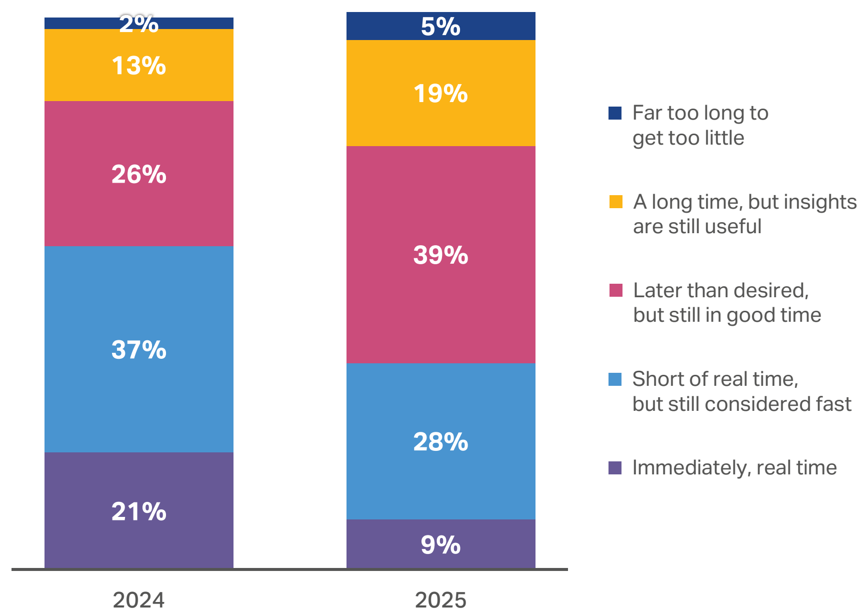
For CMOs, data and insights have become even more critical to their remit: The ability to move from signal to decision quickly is what separates reactive marketing from resilient leadership. Although marketing leaders have no shortage of data at their fingertips, their ability to elicit actionable insights that drive the organization forward is only as good as the systems that support it. But when it comes to those systems, many have mixed views.

© 2025 Nielsen Consumer LLC. All rights reserved.

While only a small percentage (**9%**) say they've unlocked "real-time" insights, **none** said the lag time was so long that it invalidated the data's utility. This means the majority of CMOs are somewhere in the middle, where they consider their data-to-decision pipeline as "fast" or "in good time."

Increasing percentage of CMOs complain of time lag from data to decisions

How would you describe the time it takes from data gathering to actionable insights?



Source: NIQ 2025 CMO Outlook survey

"We pulled back on spending early, thinking it would be 'one of those years.' Now the 2026 planning process is more data driven because of that—and the environment we're in."

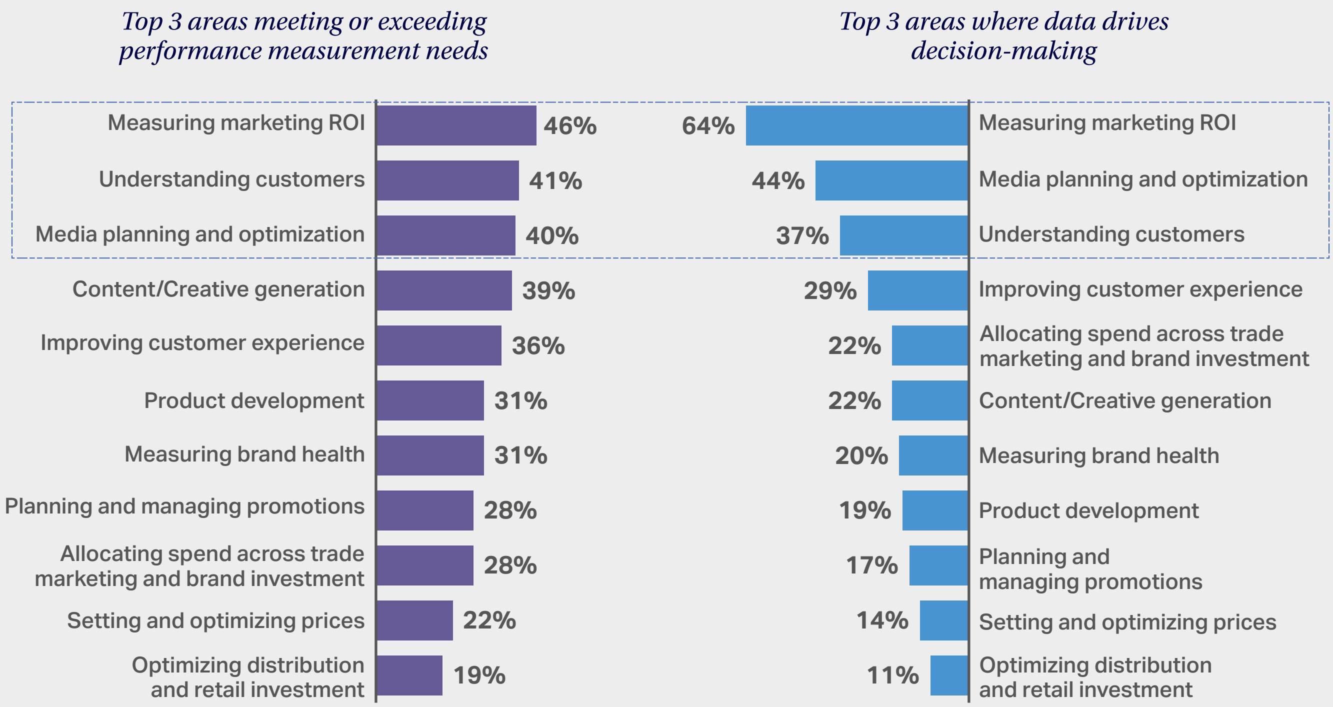
—Eddie Pellegrino, President, ***Heartland Food Products Group***

But speed isn't the only critical factor when it comes to turning insights into action. Doing so also requires the right mix of tools, talent, and internal alignment to connect disparate data sources and extract clear, actionable conclusions. And, according to our survey, that's where many CMOs are still finding friction.

When asked where the industry is currently keeping pace with their performance measurement needs, CMOs pointed to measuring marketing ROI (**46%**), understanding customers (**41%**), media planning and optimization (**40%**), and content/creative generation (**39%**) as areas of relative strength. These functions align closely with the same areas for which CMOs say data play a fundamental role in decision-making: marketing ROI (**64%**), media planning and optimization (**44%**), and customer understanding (**37%**).

© 2025 Nielsen Consumer LLC. All rights reserved.

CMOs’ top areas for performance measurement and data-driven decision-making



Source: NIQ 2025 CMO Outlook survey

This alignment is not coincidental. Rather, it reflects where pressure is likely the highest for marketing teams right now: spend justification, channel and messaging refinement, and more meaningful customer engagement. It also signals that, despite volatility, CMOs are trying to anchor their strategies in insight.

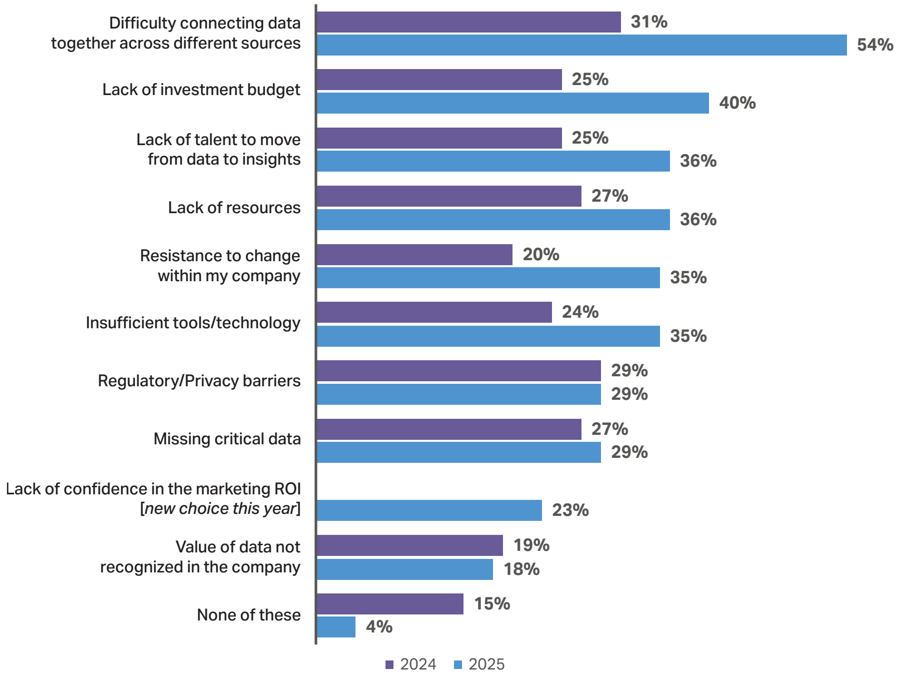
Interestingly, we also see synergy between these critical areas and where CMOs feel their organizations are performing well: media planning and optimization (**39%**), content/creative generation (**37%**), and just slightly behind, understanding customers and measuring ROI, each at **35%**. While this finding on the surface is a positive one for these areas, these percentages denote that fewer than half of CMOs share this confidence. It also **raises the question as to whether these areas are truly outperforming—or whether they are simply better measured or receiving more resources**. Either way, the net of these responses highlights a gap for measurement capabilities across the full marketing ecosystem.

But closing it comes with challenges: One of the biggest impediments CMOs cite for achieving their data and insights potential is connecting data across sources.

© 2025 Nielsen Consumer LLC. All rights reserved.

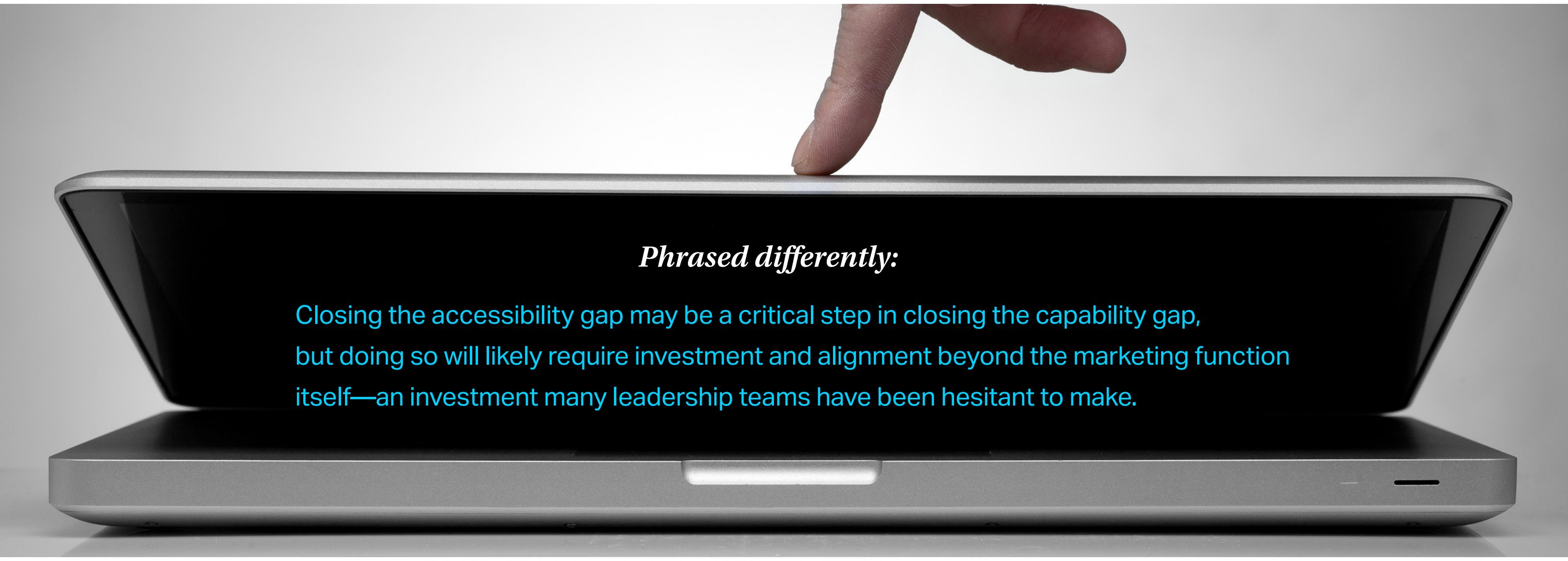
Barriers to brilliance: Top challenges marketing teams face

Are any of the following holding your marketing team back from realizing its full data and insight potential?



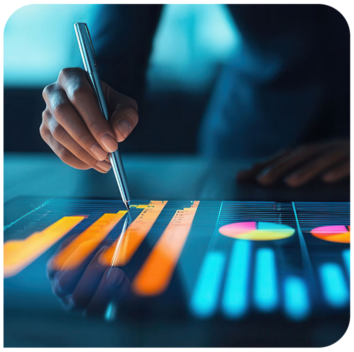
Source: NIQ 2025 CMO Outlook survey

Compounding this challenge is a lack of investment budget, followed by lack of talent. These barriers may be more intertwined than they appear: Only **37%** of CMOs say they have a centralized data lake that's easily accessible to all stakeholders—a foundational capability that requires both funding and cross-functional buy-in. Without access to integrated, usable data, teams are limited in their ability to build skills, experiment, and generate meaningful insights.



© 2025 Nielsen Consumer LLC. All rights reserved.

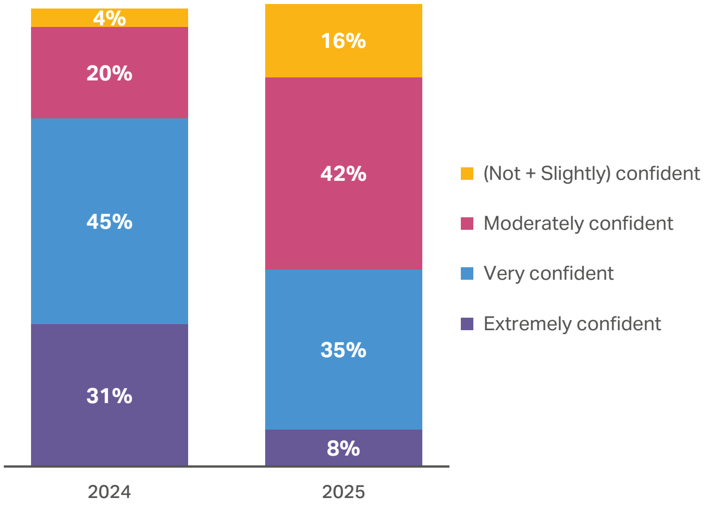
Finally, compared with last year's survey results, confidence in the futureproofing of their current data and insights capabilities is down. But it seems that CMOs are slowly moving the needle on how they leverage data—perhaps in response to the increased pressure to do so. While most (**74%**) CMOs still said they primarily rely on descriptive analytics, this number was down from last year's 81%. Meanwhile, the gap between prescriptive (**42%**) and predictive (**49%**) analytics usage seems to have grown closer year over year. Although there's still room to grow their data sophistication, the accessibility and resourcing gaps noted above may be holding CMOs back from doing so.



The gap between prescriptive (*42%*) and predictive (*49%*) analytics usage has grown closer YOY.

CMO confidence in data systems' adaptability drops year over year

How confident are you that your data, analytics, and insights systems will be able to adapt to answer critical business questions that will be asked in the future?

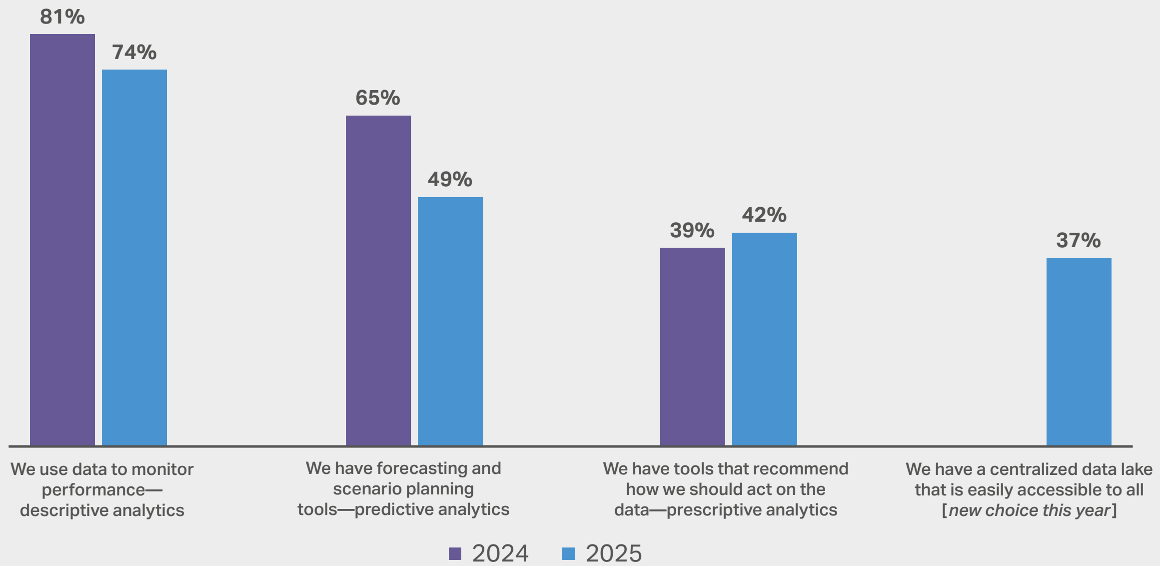


Source: NIQ 2025 CMO Outlook survey

© 2025 Nielsen Consumer LLC. All rights reserved.

Data sophistication: How far along the analytics journey are most CMOs?

Which of the following describes how your marketing team works with data to achieve your goals?



Source: NIQ 2025 CMO Outlook survey

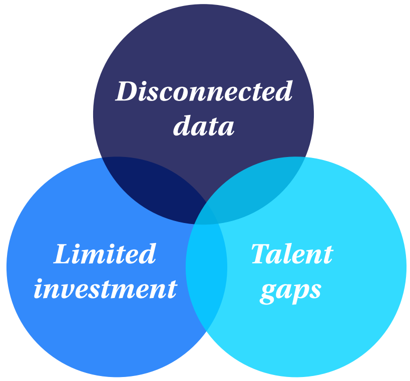
Key takeaways

- CMOs have mixed feelings about their future-state data and insights capabilities, which appears to be at odds with their general optimism about future-state performance of their teams, signaling that it's never been more important for CMOs to prioritize data quality, analysis, and cohesion—and to effectively communicate the results with appropriate stakeholders.

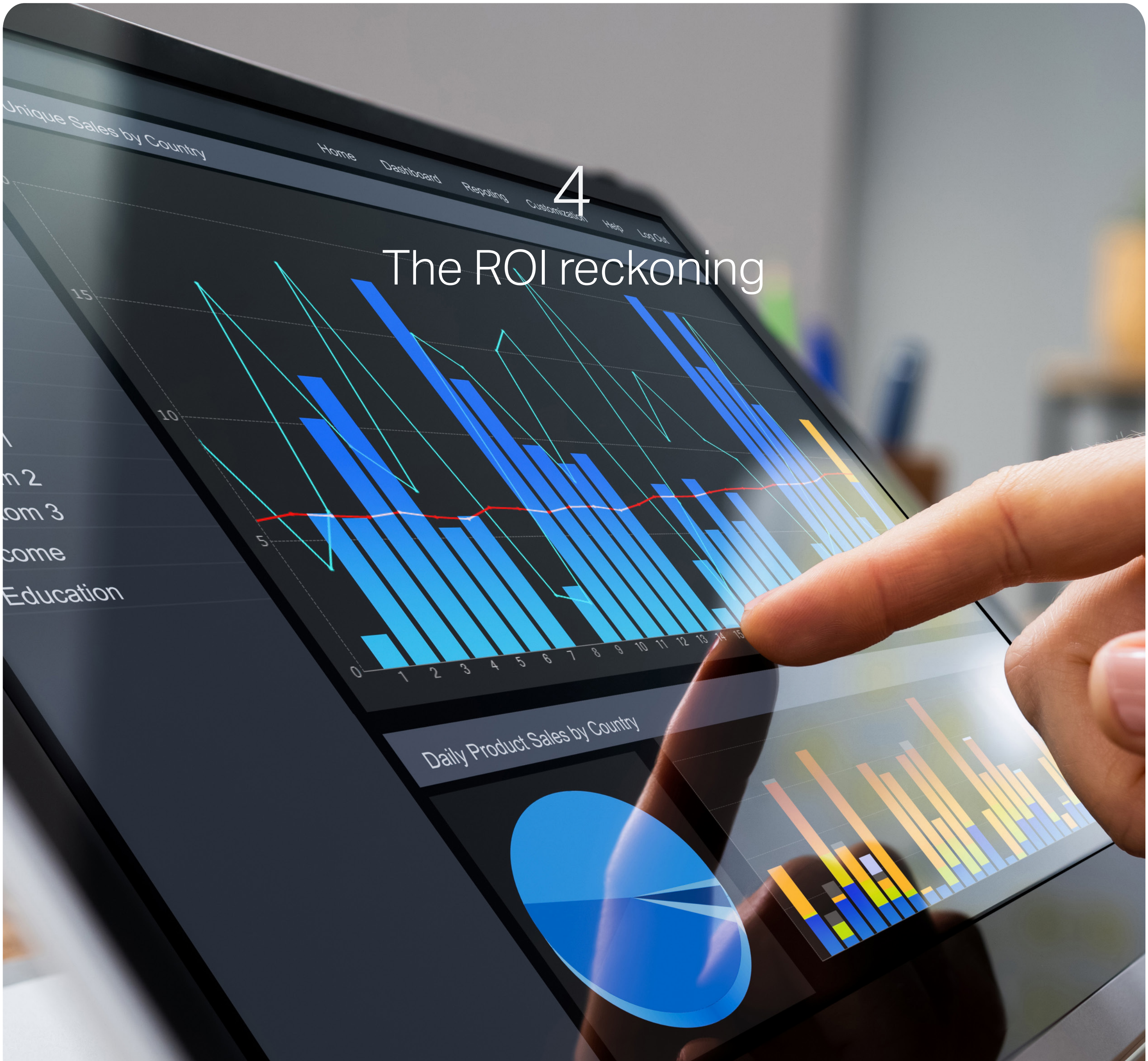
- Overall, CMOs identified measuring ROI, media planning and optimization, and understanding customers as key areas for data-driven decision-making and strong organizational performance. But the distribution of their responses indicates their confidence is far from universal, raising a critical question: Are these functions truly outperforming—or simply known areas of focus and prioritization?

- Disconnected data, reduced budgets, and talent gaps remain CMOs' largest challenges. While portions of these can be solved for within the marketing department, many of the solutions depend on cross-functional partners' support. CMOs remain tasked with delivering more across the board, on far leaner budgets.

The biggest barriers to unlocking full potential?



© 2025 Nielsen Consumer LLC. All rights reserved.



4
The ROI reckoning

Navigating the measurement maze

In our previous chapter, we noted that CMOs prioritize ROI measurement and have confidence in both the industry's ability to keep pace with their measurement needs, as well as (perhaps to a smaller extent) their own performance in this area. To that end, **84%** of CMOs also cited marketing ROI as their most popular metric for allocating budget across media portfolios.

© 2025 Nielsen Consumer LLC. All rights reserved.

Yet when we zoom in on the present-day dynamics of media strategy and measurement specifically, the picture becomes more nuanced.

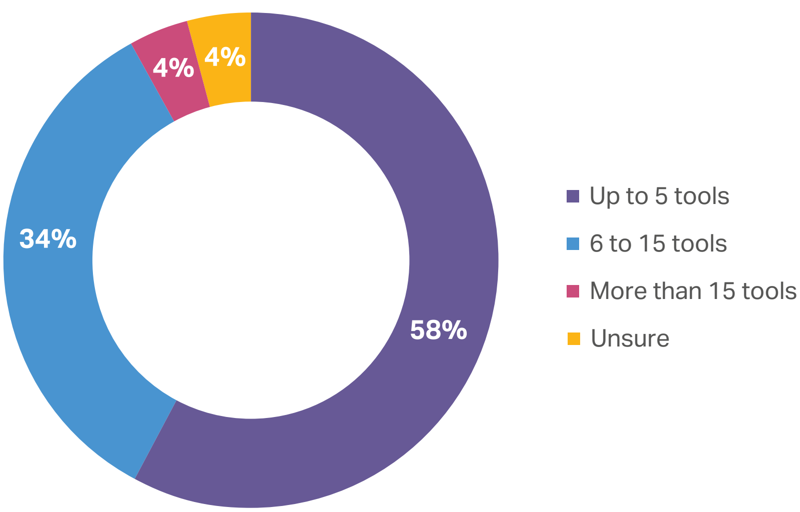
With more channels than ever to connect with their customers, CMOs are tasked with strategically wrangling these touchpoints into a frictionless ecosystem that prioritizes seamless engagement and path to purchase. But doing so isn't easy: Walled gardens, growing privacy regulations, and the sheer number of on- and off-platform channels—each with their own creative format, pricing model, and dashboards—make holistic ROI measurement challenging.

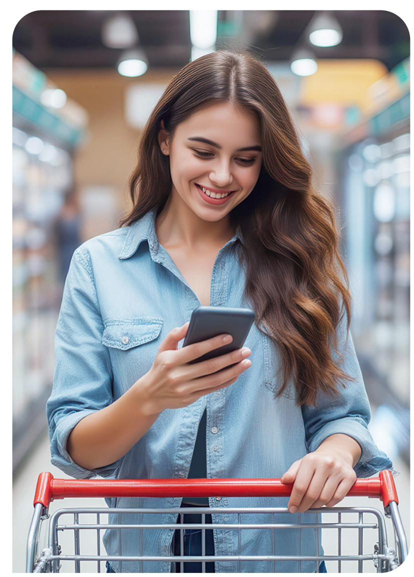
How are CMOs addressing it?

According to our survey, their two most important media investment strategies are "prioritizing flexibility and agility within our media investments" and "investing in new tools or platforms to improve media measurement and attribution"—indicating that the two likely go hand in hand. In fact, CMOs say they're using multiple tools to measure ROI—in **one-third** of cases, **6 to 15** tools and, in rare cases, **more than 15**!

CMOs relying on multiple tools to measure performance

How many media performance measurement tools are you currently using?





Source: NIQ 2025 CMO Outlook survey

© 2025 Nielsen Consumer LLC. All rights reserved.

When it comes to channel investment, however, CMOs are stacking their bets in digital media: A study conducted earlier this year found that digital comprises 61.1% of total marketing spend—a finding that reflects our own. When it comes to media planning and optimization, **62%** of our surveyed CMOs say that digital channels provide the best performance, while **75%** feel empowered with the information they have to make decisions about—and allocate budget across—digital channels.

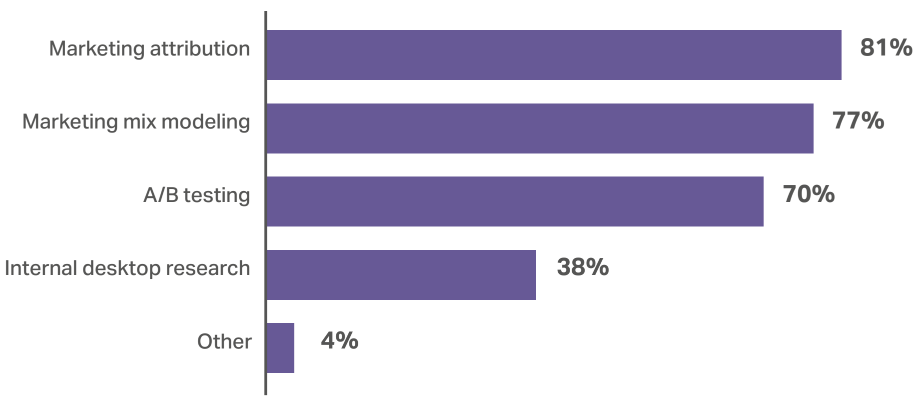
On the one hand, these insights are unsurprising: Digital channels offer faster feedback loops, greater flexibility and scalability, and the ability to precisely target audiences—a lever **78%** of our CMOs rank as having a significant impact on generating ROI. Importantly, digital channels also typically provide better attribution capabilities, which **81%** of our respondents say is a method they use to measure their ROI.

62%

of CMOs surveyed say that digital channels provide the best performance

How CMOs measure marketing ROI

Which of the following tools do you typically use to evaluate marketing ROI?



Source: NIQ 2025 CMO Outlook survey

On the other hand, digital channels are also the most fragmented sources of data, exacerbating **the biggest struggle CMOs report having: the ability to connect the dots across their entire marketing efforts**.

To bridge these gaps, many are turning to advanced analytics like marketing mix modeling (MMM) to bring together highly granular sources of omnichannel data that reveal what's actually driving results. And as AI technology evolves, there's even more promise in its growing capabilities to make this process more efficient and accessible—democratizing insights for all.

© 2025 Nielsen Consumer LLC. All rights reserved.

Creative quality: An ROI blind spot?

With budgets under scrutiny and allocation decisions hinging on performance, CMOs must probe deeper to identify the "why" behind their ROI: Which variables are driving it, and where is there room for optimization?

In our survey, we asked CMOs to identify the levers they feel make a significant impact on marketing ROI:

- Audience targeting and reach: **78%**
- Campaign structure and execution: **69%**
- Creative: **60%**
- Media mix: **58%**

The sizeable gap between perceived effectiveness of targeting and reach versus creative raises a complicated question: **Are CMOs missing opportunities by undervaluing creativity?**

The research points to yes.

The rise and evolution of digital and programmatic technology over the years has been met with justifiable enthusiasm from marketers. For many, its ability to target audiences with precision—personalizing and serving content to the right person, in the right place, at the right time—has swung the pendulum away from creative refinement and toward an emphasis on reach and execution.

But this shift has come with a cost: Even with on-point targeting and flawless execution, lackluster creative can tank an entire campaign. On the flipside, great creative can empower those carefully constructed media plans to deliver at their fullest: Research from NIQ and others has found that it can generate up to 50% in sales lift. And beyond the short-term impacts, great creative also triggers long-term brand recall—embedding into consumers' implicit connections, associations, and memory—ultimately driving decision-making.

As CMOs reassess their short- and long-term brand strategies to account for shifting consumer demands, it's clear that creative is a critical lever for success. But just as with any strategic investment, marketing leaders must prove its impact on business outcomes, which can be complicated. Not all creative serves the same purpose, and the definition of "creative" itself is constantly expanding. Today, creative spans AI-generated content (such as ads and copy), creator-driven content (like social posts and reviews), and experiential activations (including augmented reality, installations, and pop-ups). Each of these requires distinct measurement approaches, yet they must also integrate seamlessly with traditional creative elements.

CMOs identify top levers that make a significant impact on marketing ROI:

78%
Audience targeting and reach

69%
Campaign structure and execution

60%
Creative

58%
Media mix

Source: NIQ 2025 CMO Outlook survey

© 2025 Nielsen Consumer LLC. All rights reserved.

How can marketing leaders ensure they're giving creative its due as an ROI driver?

- **Treat creative as a modeling variable:** When developing your MMM or ROI modeling strategy, include measures of creative—such as message variants, quality scores, and reach—alongside media spend, channel, and other variables.

- **Ensure creative data is captured consistently:** Standardizing, codifying, and quantifying measures such as format, messaging, platform, and audience can help models isolate incremental impact.

- **Build an operational loop**: Once you've included creative performance as a variable in your modeling, you can estimate its creative impact and validate through A/B testing or other experimentation. Use those findings to inform creative planning and budgeting.

- **Measure consumers' explicit *and* implicit responses to creative**: While traditional ad testing methodology like survey questionnaires can provide helpful direction, combining it with non-conscious measures like emotional responses can unlock invaluable insights and empower marketers to pinpoint areas for optimization.

Creative development is a powerful ROI enabler. CMOs who measure and optimize their creative effectiveness alongside other key levers for growth can unlock strengthened returns while building brand equity.

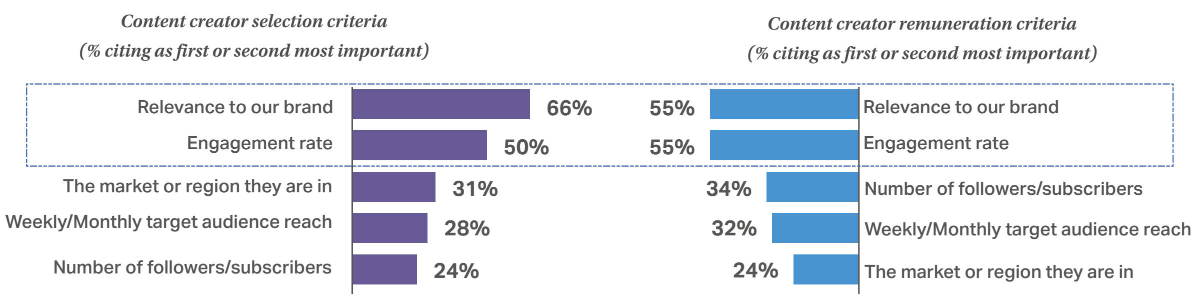
The creator economy: Navigating promise and pressure

The use of social influencers—or content creators—within media portfolios has rapidly grown from niche to mainstream (to even table stakes for some industries like Beauty). In our survey, **half** of CMOs ranked this channel as either their first or second best-performing media channel, behind only other digital media (e.g., online advertising, streaming) at **85%**, and ahead of traditional media (e.g., television, radio) at **37%** and RMNs at **27%**.

But as our survey and interviews revealed, many marketing leaders are still seeking clarity about how to optimize this crucial channel: Fewer than half (**45%**) say they feel confident with the information they have to make decisions and allocate budget.

This opacity extends to creator selection and remuneration. Across the board, CMOs say that for creator selection, brand relevance is their primary criterion, followed by engagement rate. For remuneration, brand relevance and engagement rate were neck and neck as the top criteria.

What matters most: How CMOs choose and pay content creators



Source: NIQ 2025 CMO Outlook survey

However, our interviews revealed that "brand alignment" can be hard to pin down, and ensuring both the right fit and quality engagement involves much more nuance. One CMO shared that selecting the right creator for their brand doesn't come down to a set checklist: It's a matter of "doing their homework"—and learning from past miscalculations. For another, it's a balance of reach versus authenticity—particularly in their industry, where creators with large audiences (10,000 or more) are often viewed as less trustworthy. Although seeking out creators with smaller audiences boosts brand credibility, it also increases the number of creators they must seek out and leverage to ensure widespread engagement.

When it comes to the activities marketing teams are using creators for, CMOs say that product reviews (**45%**) and sponsored content (**43%**) are the most important for their brand. And when it comes to evaluating ROI, they once again prioritize number of engagements (**63%**), followed by audience reach and frequency (**42%**). **Even with measurement parameters in place, however, leaders must still navigate skepticism and tough questions from their C-suite peers about the effectiveness of creator marketing**—often coming down to the percentage of sales being driven by this channel. This insight—combined with CMOs' lack of confidence in decision-making data and persistent challenges in connecting metrics—signals an urgent need for unified measurement frameworks that not only consolidate content creator metrics but also tie them directly to business outcomes.

The CMOs we interviewed agreed that while the creator economy is currently a critical lever for their brand strategy, the pace at which technology and consumer behavior are evolving means it will only be a matter of time before the next new and disruptive channel emerges. **Staying ahead of these shifts will require attention to the latest technology advancements, government regulations, and consumer data that can help identify shifting consumer trends**.

© 2025 Nielsen Consumer LLC. All rights reserved.

Key takeaways

- Demonstrable ROI is the primary criterion for future marketing budget allocation, yet full-funnel ROI storytelling remains elusive, pushing CMOs to increase their investments in digital channels where ROI is most apparent.

- CMOs are heavily investing in influencers/content creators, yet C-suite skepticism and unclear ROI persist. CMOs prioritize brand alignment and engagement for selecting and remunerating creators, but particularly if it's the first time they've leveraged the creator, the true ROI of such investments remains unclear until campaigns conclude. Despite these challenges, content creators remain a highly cost-effective mechanism to generate engaging content at scale.

© 2025 Nielsen Consumer LLC. All rights reserved.

5

From buzzword to business value: AI and its marketing mandate

Last year's NIQ CMO Outlook report spotlighted the rise of AI (particularly generative AI) as a transformative force for accelerating marketing growth and efficiencies. At the time, most CMOs reported being in exploratory phases with GenAI, using it selectively for a handful of functions—top among them content creation, improving customer experience, and understanding customer behaviors.

© 2025 Nielsen Consumer LLC. All rights reserved.

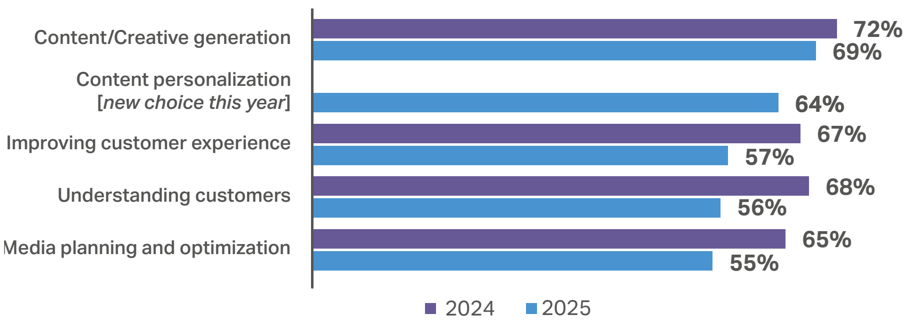
One year later, the pressure to implement more AI efficiencies has only intensified. CMOs report mounting expectations from CEOs and CFOs to articulate an AI strategy—one that promises cost savings without compromising data integrity.

Yet for all the headlines and hype, our survey shows less movement in GenAI adoption compared with last year. Across functions—from customer insights to content creation—marketing teams remain in exploratory mode or are using AI only to some extent.

Is there a disconnect?

Where CMOs are putting GenAI to work

Please tell us the extent to which you are using Generative AI for the following tasks. (Sum of % using either "as a standard" or "to some extent")



Source: NIQ 2025 CMO Outlook survey

The stagnation might be less about reluctance and more about nuance: **AI has been part of the marketing ecosystem for years—long before generative AI dominated headlines**. Embedded functions like send-time optimization and automated journey orchestration were marketing technology (martech) stack table stakes long before they were marketed as "AI-powered."

> ***"[Companies] that aren't laggards in tech and are able to maximize the upsides while responsibly navigating the limitations of AI will be the winners of the day."***
>
> *—Jing Mertoglu, Global VP Insights & Analytics | Marketing Excellence,* ***Suntory Global Spirits***

Although watchouts remain for accuracy issues like bias and hallucinations, the use of GenAI to some extent or as standard has been an easy win for marketers seeking efficiency in functions like desktop research, drafting briefs, and content marketing. **For CMOs, the question isn't whether AI is a valuable asset; it's whether its impact aligns with their desired outcomes**. As one CMO who serves on their company's AI taskforce noted, ***they* are driving the technology**, not the other way around. Use case is their primary focus when considering where and how to integrate AI.

© 2025 Nielsen Consumer LLC. All rights reserved.

Still, marketing leaders must clearly articulate and instill confidence in their cross-functional partners that they are sufficiently AI powered and driving impact—from efficiency gains to better budget allocation and ROI. To do this, CMOs should showcase tangible examples, framing these capabilities in terms of business outcomes, ensuring their stakeholders see the marketing organization as a tech-driven growth engine.

The new tension: When generative AI joins the creative table

Generative AI's recent advancements offer vast potential to transform the advertising industry. An explosion of tools such as Google Veo 3.1, Runway Gen-4, Adobe Firefly, Sora, Creatify.ai, and many, many more allow users to create text-to-video or image-to-video content that some say rivals human output—in seconds. For CMOs, this shift offers both thrilling opportunity and undeniable internal tension.

From a business standpoint, the appeal is clear. GenAI tools promise faster production, lower costs, and new creative possibilities. They can scale content production across channels, instantly adapt messaging for multiple audiences, and personalize campaigns in real time—freeing teams from repetitive work and compressing timelines that once stretched for weeks into days. Early adopters, from small businesses to major global brands, are already using AI to deliver winning ads faster. **This speed-to-market advantage is especially appealing in today's attention-fragmented environment, where agility can be the difference between leading and lagging**.

Yet beneath the excitement lies a growing undercurrent of anxiety. Surveys show that many marketers—often more than 60%—fear AI could "steal their jobs" in areas from copywriting and ad creation to video editing. As AI systems increasingly participate in the creative process, marketing teams are grappling with what "human creativity" now means, and whether brand authenticity can survive machine-generated output.

There's a twist in this tale, however. Studies from sources as diverse as NIQ, academic researchers, and Shopify partners show that **ads that are perceived as being AI-generated perform less well in areas such as memory activation, word of mouth, and purchase intention**. Humans have an instinctive mistrust or antipathy for things they perceive as "fake." Ads in which the image was AI-generated can outperform ads with human-generated images in terms of click-through rates, but only if these AI-generated images *don't look like AI*.

For CMOs, GenAI can aid marketing organizations in becoming faster, more adaptive, and more productive. But, if deployed carelessly, it can dilute creative differentiation and weaken marketing performance. CMOs who strike the right balance will not only calm the fears within their organizations; they'll redefine what creativity means in the AI era. That means positioning AI as a co-pilot, not as a replacement, and as an amplifier of human creativity rather than a substitute. It also requires investing in new skill sets—from "prompt" design to ethical oversight—and reshaping workflows so that human judgment remains central to brand storytelling and visual creation.

© 2025 Nielsen Consumer LLC. All rights reserved.

When it comes to AI adoption and its potential for high-impact marketing outcomes, the stakes seem highest for analytics and reporting—particularly as omnichannel strategies are increasingly a non-negotiable. As we noted in our previous chapter, CMOs must not only deliver seamless experiences across channels, they must also prove ROI/ROAS across on- and off-platform investments. Growing media fragmentation adds layers of complexity to this task, while the availability, accuracy, and integration of data that can empower AI capabilities poses even more challenges.

Perhaps the best example of this dynamic is with RMNs, which have become central to CMOs' growth strategies: **69%** say RMNs are growing in importance, while **67%** expect RMN investments to increase in the coming year. Alignment with other marketing strategies and staying competitive were cited as the primary reasons for investing in this tool, while for others, RMNs are tied directly to distribution opportunities: **21% of CMOs say the top reason to invest in RMNs is to secure shelf space**—a dynamic that creates a direct link between marketing and operational outcomes.

21%

of CMOs say the top reason to invest in RMNs is to secure shelf space

While slightly more than half (**53%**) of CMOs feel that RMNs offer adequate measurement and attribution for their business, proving incremental ROAS in this environment is daunting. No two retailers measure ROAS the same way, and retailer-specific data requires a significant investment (which can be hard for emerging brands in particular). Additionally, formulas are often opaque, leaving room for inaccuracy or misinterpretation. In fact, a Kellogg School of Management study found that the application of different methodologies can shift ROAS significantly, making it hard to know the true effectiveness of an ad.

AI can help synthesize disparate data sources, identify trends, and optimize spend—but only if the underlying data structure is strong. As some of the marketing leaders we interviewed pointed out, **the ability to see the full view of high-frequency, highly granular omnichannel data and integrate it into AI platforms is a must**. Without it, they are left with surface-level reporting that falls short of actual impact. As CMOs continue to explore new AI solutions, it's important they think beyond simply driving efficiencies. Upholding credibility is key—and it starts with the integrity of the data these tools run on.

Because the AI push shows no signs of slowing down anytime soon, CMOs should simultaneously focus on building change resilience within their teams. By fostering a culture of exploration and curiosity—one that encourages experimentation while also preparing for the next iteration of technology, marketers will learn to integrate, adapt, and scale these new ways of working more quickly and effectively.

© 2025 Nielsen Consumer LLC. All rights reserved.

Start with the problem, not the platform

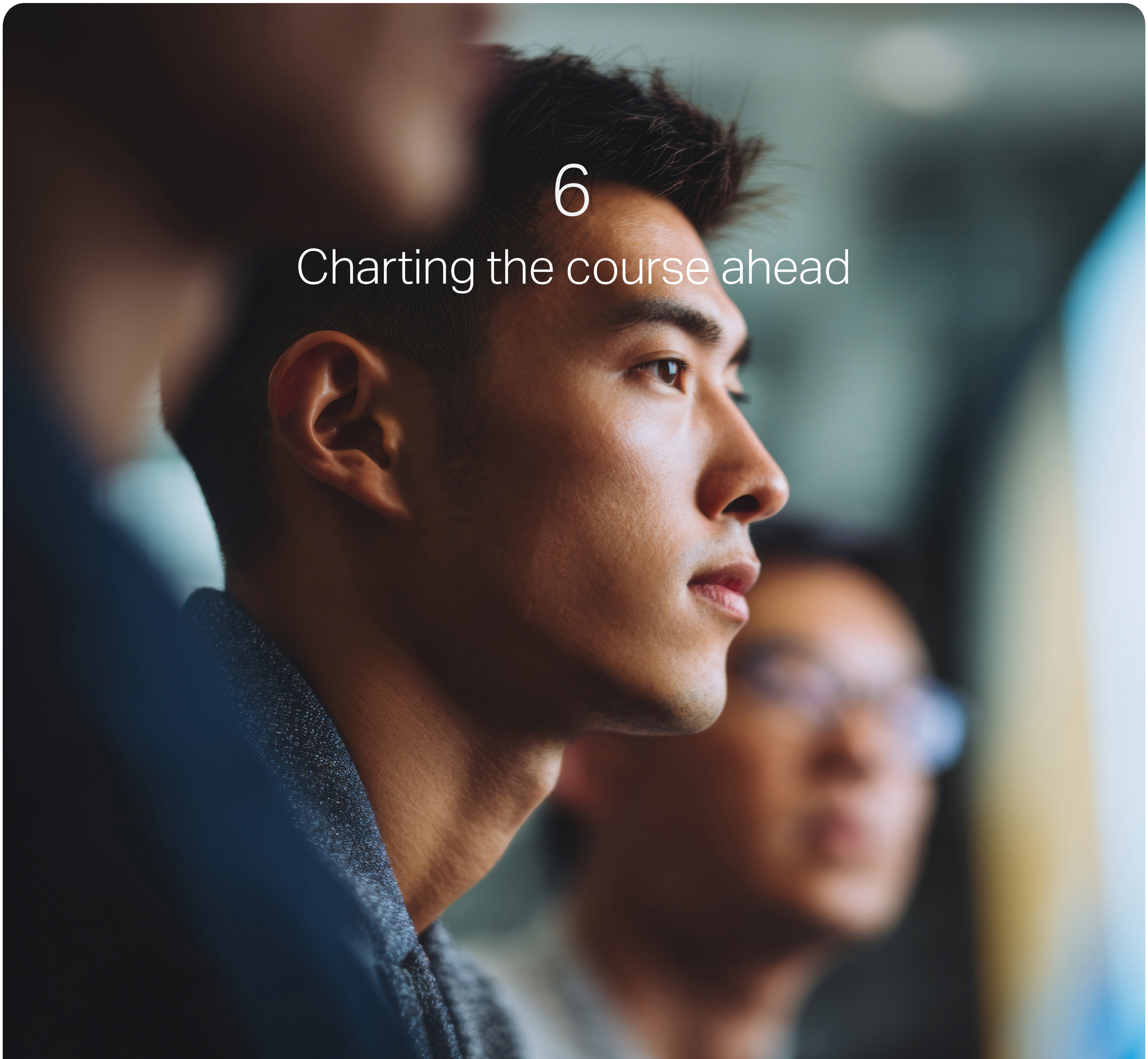
Incremental AI investment makes sense when it bridges gaps, unlocks new creative or decision-making capabilities, or can effectively automate work that otherwise requires human hours that could be spent on other tasks (i.e., it should free up time to work on other things). **We asked CMOs to share more about the criteria they use to assess new AI vendors, solutions, or integrations. They pointed to the following:**

- **Efficiency vs. innovation**: Is the goal to optimize what exists or to unlock new capabilities?
- **Redundancies**: Are existing tools already solving for the same outcomes that AI promises?
- **Integration**: Can AI capabilities plug into current platforms? Do they add silos or facilitate more connectivity?
- **Human bandwidth**: Are teams still spending manual hours on repetitive work that AI could automate more intelligently, freeing them to spend time on other tasks?

Key takeaways

- C-suite pressure for AI-driven efficiencies is intensifying, and the goalposts for generative AI adoption keep shifting. GenAI tools are now firmly embedded in both strategic and tactical execution across global marketing teams. What remains an area of concern for CMOs, however, is what percentage of that work product should be external versus internal. Secondarily, quality control remains a primary focus for CMOs.
- AI tools offer speed and scale for content creation, enabling rapid adoption across channels. But research shows that AI-generated ads often underperform in distribution, potentially eroding brand trust and reducing conversion. CMOs must find the balance between leveraging GenAI solutions and human expertise to meet organizational goals of increased efficiency while maintaining brand equity.
- Beyond GenAI, the vast majority of AI's promise lies in its ability to unify fragmented platforms and analyze performance across channels, including retail media networks.
- CMOs' primary objectives remain harnessing the full potential of AI-driven marketing solutions, investing in new AI solutions that will improve efficiency, and effectively communicating the value of their martech stack to cross-functional partners and the C-suite.

© 2025 Nielsen Consumer LLC. All rights reserved.



6
Charting the course ahead

The days of “good enough” in marketing are over: Vanity metrics and gut-driven decisions are no longer passable, and budgets hang in the balance as CMOs are being challenged to dig deeper into the data, balance short-term wins with long-term growth, and embrace emerging technologies in their day-to-day operations.

© 2025 Nielsen Consumer LLC. All rights reserved.

Despite these shifts, there are signs of resiliency: CMOs are confident (for now) in their established brand equity, their marketing teams are slowly adopting more sophisticated tech and analytics capabilities, and their three-year outlook on growth remains optimistic.

To win in 2026, brands must accept that disruption and complexity are no longer exceptions but rather, part of the new operating environment—and respond accordingly. The path forward will demand even more budget recalibration and data-based decisioning, pressuring marketing leaders to move beyond reporting to real optimization.

© 2025 Nielsen Consumer LLC. All rights reserved.

To rise to this challenge, CMOs should integrate the following actions and tools into their toolkit as they build their 2026 strategies:

Action	Why it matters	How NIQ can help
Stay ahead of market conditions and consumer trends	If the last decade has taught leaders anything, it's that success doesn't come from reacting to disruption but rather, from staying two steps ahead of it. Anticipating change means staying attuned to the big picture of market, category, and competitor dynamics, as well as consumer trends and motivations. By rooting marketing agility in foundational data, CMOs can make better decisions about media investments, digital shelf optimizations, and new growth opportunities.	• NIQ Consumer Life • NIQ Omnichannel Commerce • NIQ Omnishopper
Assess your brand and marketing effectiveness	No matter how well-known or established it is, a strong brand is never stagnant—it's constantly tested, evaluated, and optimized to ensure it effectively resonates with its target audience. As CMOs navigate consumer shifts, new media channels, and rising expectations, they must also assess their creative, ensure they're reaching their target audience, and nurture brand loyalty.	• NIQ Audiences & Personalization • NIQ Brand Architect • NIQ Growth Architect • NIQ Marketing Effectiveness
Connect data ecosystems	CMOs need more than data in isolation—they need connected intelligence that provides a full view of the consumer and retailer landscape, accessible in a centralized location. By empowering teams with data access, leaders can break down cross-functional silos and align behind a single source of truth, empowering them to move more quickly and with precision.	• NIQ Marketing Effectiveness

© 2025 Nielsen Consumer LLC. All rights reserved.

Action	Why it matters	How NIQ can help
Maximize ROI through better campaign management and measurement	As CMOs face increased pressure to justify marketing investments, they need a holistic and unbiased view of performance. Analytics tools like Marketing Mix Modeling (MMM) analyze data across the total store to determine what truly drives sales and brand outcomes, while integrated platforms can reduce RMN fragmentation by consolidating data, activation, and measurement capabilities. When equipped with this information, marketing leaders can take more decisive action on investment decisions and resource allocation.	• NIQ Audiences & Personalization • NIQ Marketing Effectiveness
Leverage AI-powered technology for better data-decisioning	Descriptive analytics can offer a robust snapshot of *what happened*—but to stay ahead of disruptions, CMOs must also understand *what will happen next* (predictive analytics) and *what to do about it* (prescriptive analytics). Keeping in mind that any robust analysis requires a foundation of best-in-class data, AI technology has democratized advanced capabilities, making it possible for teams to analyze massive volumes of data, detect patterns, forecast outcomes, and receive data-driven recommendations.	• AI at NIQ

As marketing leaders recalibrate their day-to-day remit, their path forward demands integration—of teams, technology, and data. In 2026, their success will hinge on the ability to meet uncertainty with insight, turn complexity into clarity, and lead their brands with precision and purpose.

NIQ's Global Thought Leadership & Content team values your feedback. Complete this brief survey to let us know what you think of this content.

About NIQ
NIQ is a leading consumer intelligence company, delivering the most complete understanding of consumer buying behavior and revealing new pathways to growth. Our global reach spans over 90 countries covering approximately 85% of the world's population and more than $7.2 trillion in global consumer spend. With a holistic retail read and the most comprehensive consumer insights—delivered with advanced analytics through state-of-the-art platforms—NIQ delivers the Full View™..

For more information, visit **NIQ.com**

© 2025 Nielsen Consumer LLC. All rights reserved.