



SERVICEPLAN GROUP | CMO BAROMETER

JANUARY 2025

CMO Barometer





About

CMO BAROMETER

The CMO Barometer is an annual study that surveys top marketers from the most important companies in eleven countries. This is the sixth time it has been conducted by the Serviceplan Group, the second time together with the University of St.Gallen (HSG).

UNIVERSITY OF ST. GALLEN (HSG)

The University of St.Gallen (HSG), with almost 10,000 students, is one of Europe's leading business universities. Since its founding in 1898, the University has been committed to internationality, practical relevance and an integrative perspective. The Institute of Marketing & Customer Insight at the University of St.Gallen (HSG) is a leading European academic institution that enjoys the highest recognition of their contributions to academia and management practice in the fields of marketing, communication, sales and customer insight.

LOLA X SERVICEPLAN GROUP

LOLA x Serviceplan Group is the largest independent, partner managed agency group in Europe. Established in 1970 as a classic advertising agency, Serviceplan soon developed its House of Communication concept to date, the only completely integrated agency model in Europe to unite all modern communication disciplines under one roof: Creative & Content, Media & Data and Experience & Commerce.

With 33 of its own office locations and a number of other partnerships, the Serviceplan Group is represented in a total of 20 countries worldwide and all the important economic regions.



835
CMOs

11
countries

The rA(I)ce for impact is on!

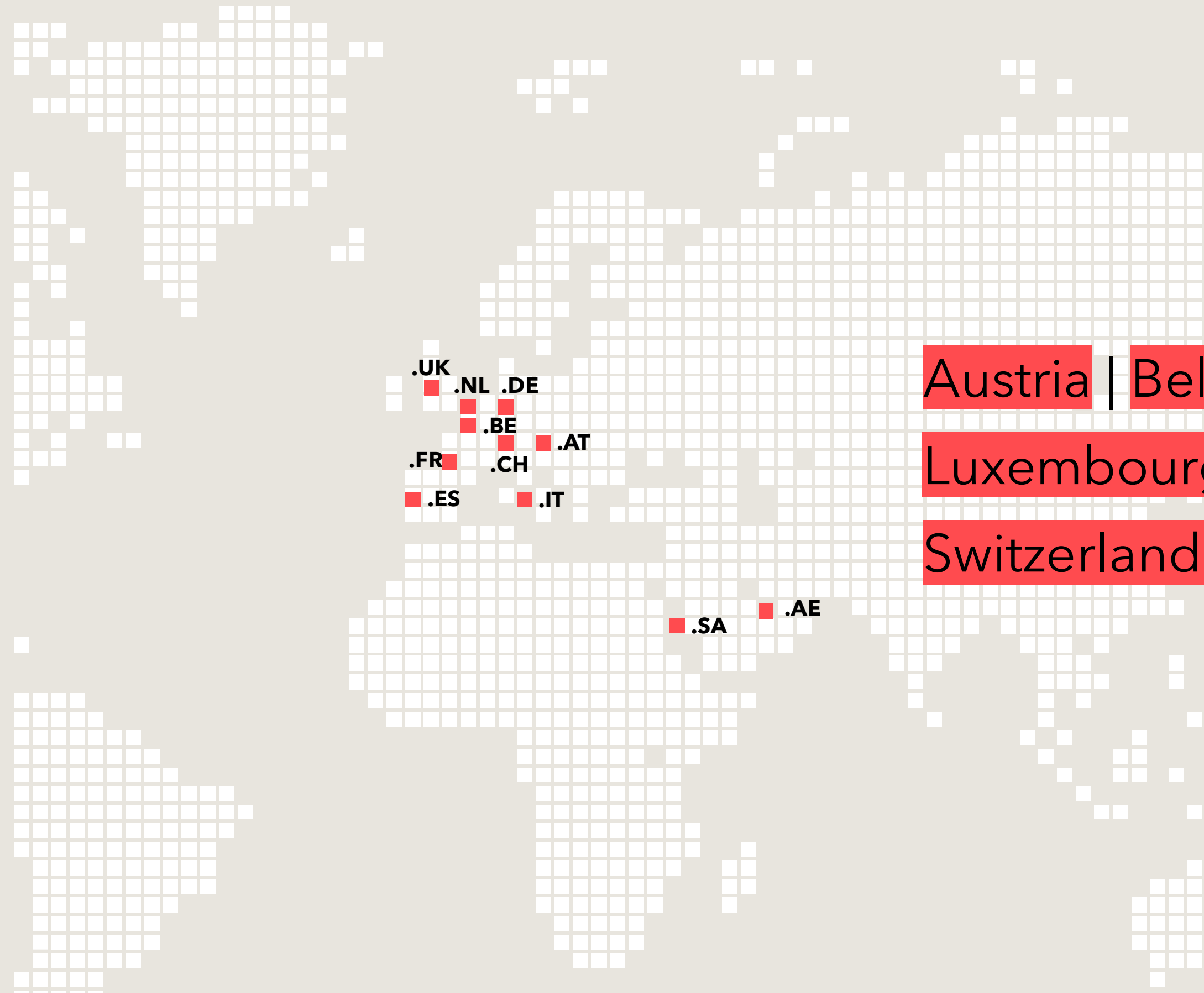
CMO*
BAROMETER

Bold Visions, tight Budgets —
How international CMOs try to keep pace
in an accelerated marketing world with AI.





Broad perspective: participants from 11 countries on 2 continents



Austria | Belgium | Germany | France | Italy |
Luxembourg | Middle East | Netherlands |
Switzerland | Spain | United Kingdom





Study Profile

Sample Size

N= 835

DE=220 AT=23 CH=185
BE&LUX=49 NE=111
ES=34 FR=93 IT=76
UK=25 ME=19

Duration

8 min

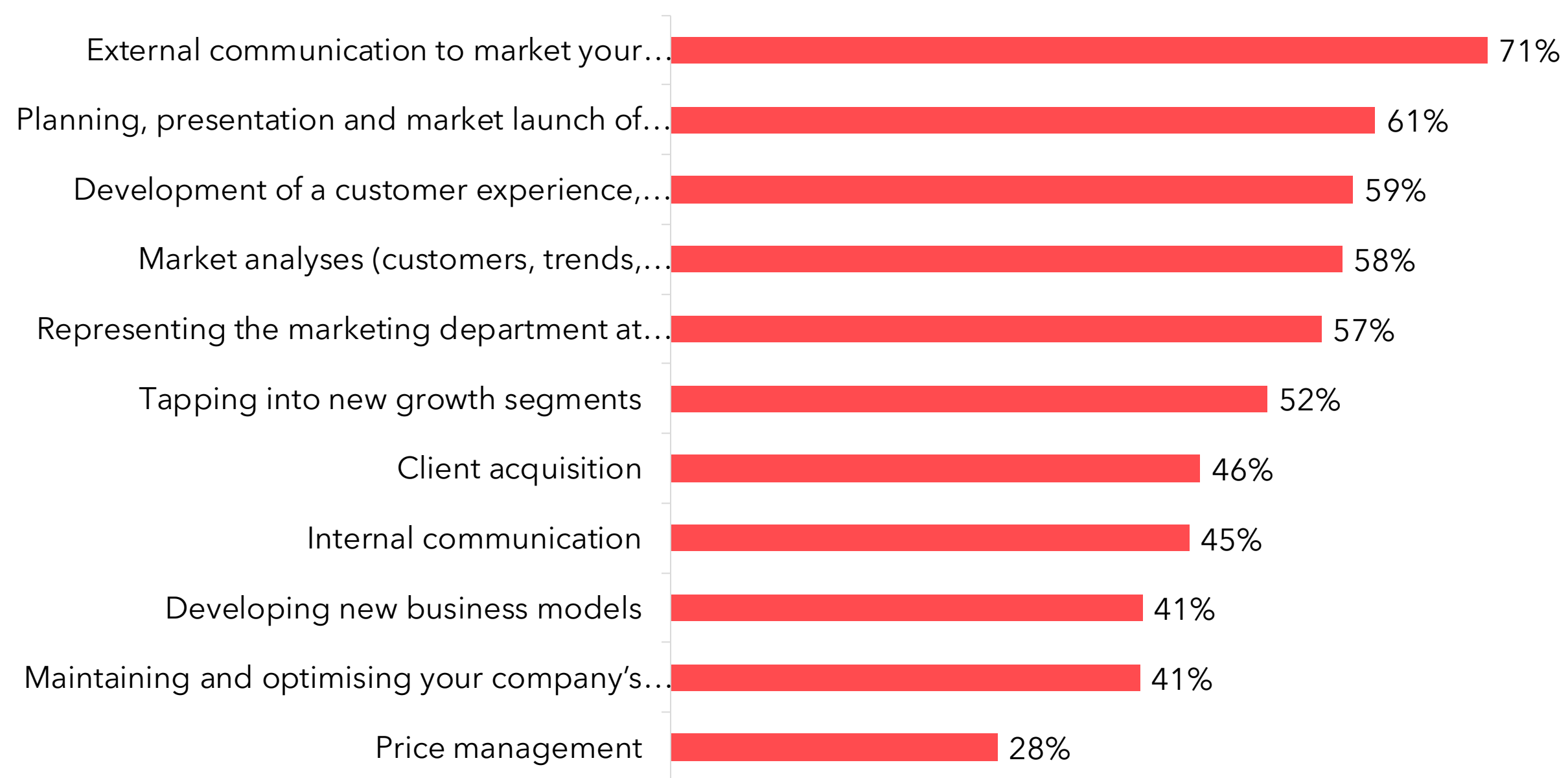
median completion time

Location

Europe

(incl. ME)

Which of the following tasks and activities fall within your area of responsibility?



Question: Which of the following tasks and activities fall within your area of responsibility?
Base: N = 835

Sample

CMOs /
Marketing decision
makers

Field Time

September 10 - 25
2024



Method

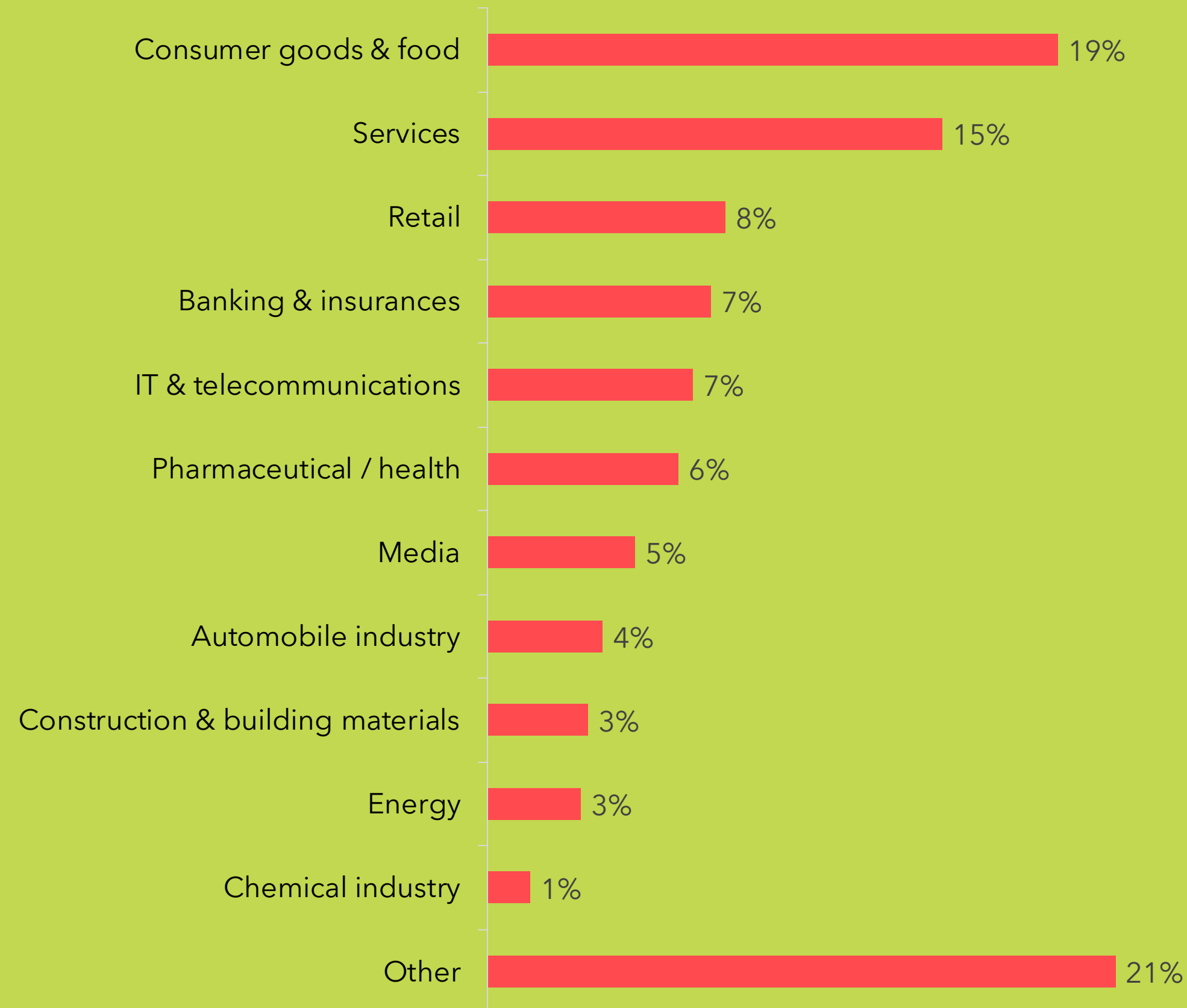
Online survey



Sample description



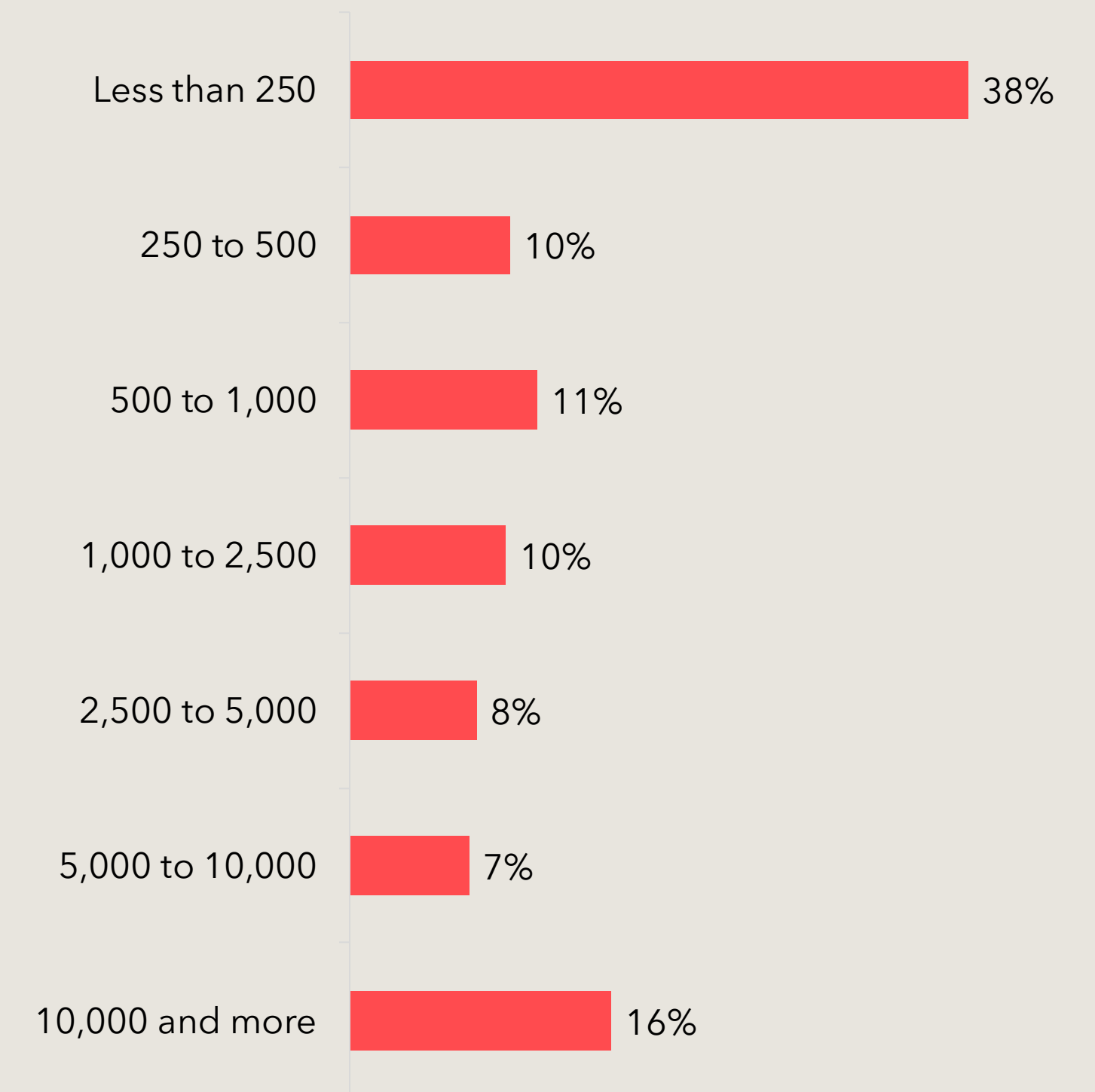
Industry



Question: In which industry is your company active?
Base: N = 835



Company size



Question: Please indicate how many employees work in your company.
Base: N = 835



7 questions regarding trends, challenges and skills in Marketing 2025

- 1 How do you think the economic situation in your sector will develop in 2025?
- 2 How will your marketing budget for 2025 (marketing investments and expenditure) develop?
- 3 In your opinion, what is the hot topic for the marketing year of 2025?
- 4 How important do you think the following marketing trends will be in 2025?
- 5 What's your superpower? Which capabilities and skills does a CMO need to have these days to make their organisation fit for the future?
- 6 Which specialist skills should a successful marketing team have?
- 7 What kind of inspiration do you expect from your agency partners in the future?



1

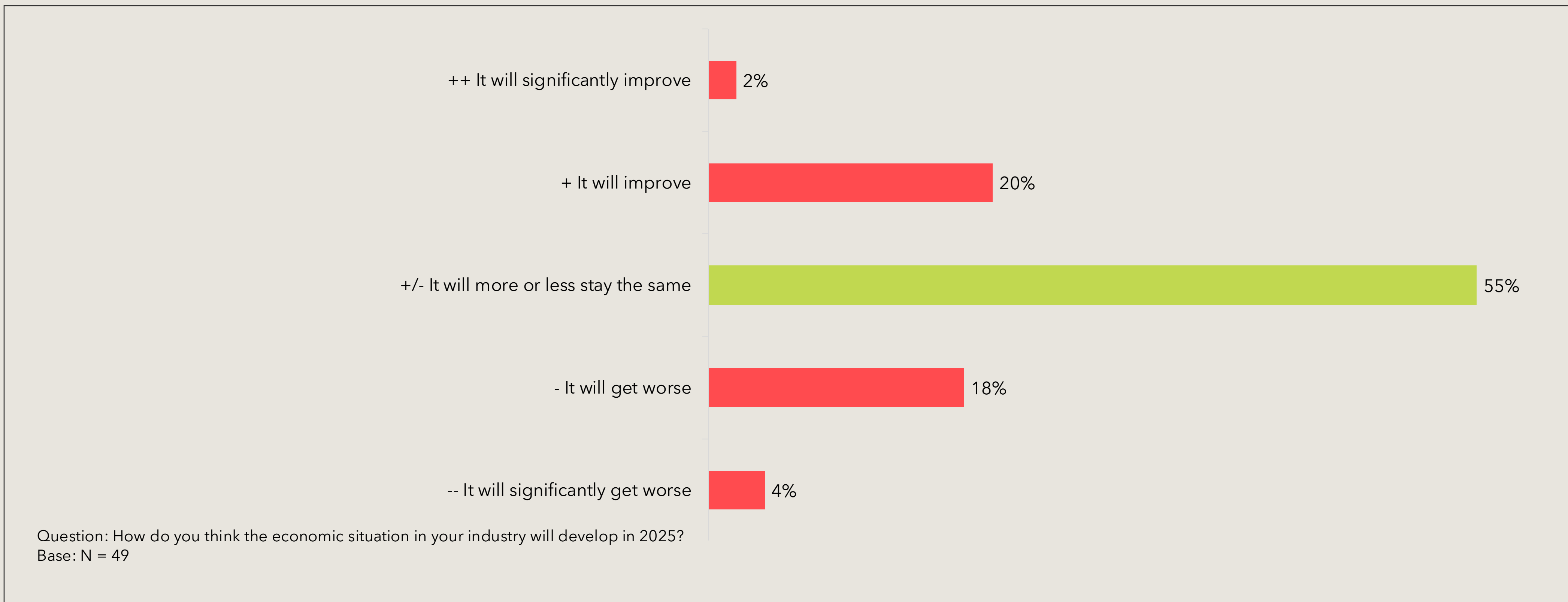
How do you think the economic situation in your sector will develop in 2025?



Majority is expecting a stagnation regarding the economic situation in their industry in 2025.

Industry outlook 2025

Numbers in Percent



Question: How do you think the economic situation in your industry will develop in 2025?
Base: N = 49

Contrasting market developments: Central Europe's ambivalent positions.

CMOs from the Netherlands and Middle East seem to have a much rosier view of the future than the rest. In fact, most respondents there believe the economic situation is improving – in contrast to the Austrian and French CMOs.

Industry outlook 2025

Numbers in Percent

	DE (n= 220)	AT (n= 23*)	CH (n=185)	BELUX (n= 49)	NE (n =111)	ES (n=34)	FR (n= 93)	IT (n=76)	UK (n= 25*)	ME (n=19*)	Overall (n=835)
Top 2: will improve	22%	9%	19%	22%	48%	32%	17%	22%	16%	42%	25%
It will significantly improve	0%	4%	9%	2%	16%	9%	2%	4%	0%	11%	4%
It will improve	22%	4%	18%	20%	32%	24%	15%	18%	16%	32%	21%
It will more or less stay the same	51%	52%	58%	55%	37%	56%	45%	57%	68%	32%	51%
It will get worse	25%	35%	22%	18%	15%	12%	37%	20%	16%	26%	23%
It will significantly get worse	2%	4%	1%	4%	0%	0%	1%	1%	0%	0%	1%
Bottom 2: will get worse	27%	39%	23%	22%	15%	12%	38%	21%	16%	26%	24%

Question: How do you think the economic situation in your sector will develop in 2025?

Base: N = 835

*Evaluation is not representative due to the small number of responses.



2

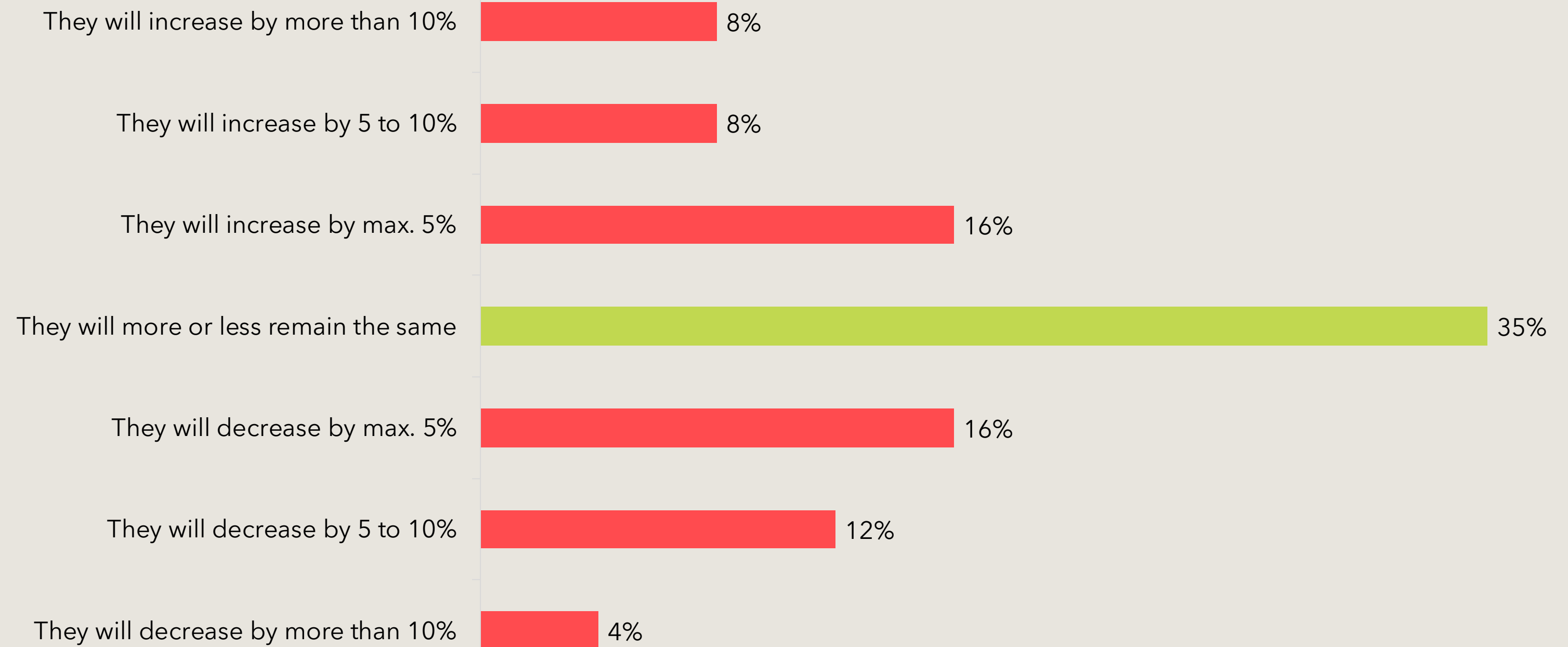
**How will your marketing budget for 2025
(marketing investments and expenditure)
develop?**



Contrasting expectations for budget: 1/3 expect it to stay the same, 1/3 expects an increase, another 1/3 a decrease.

Marketing budget projection 2025

Numbers in percent



Question: How will your marketing budget (marketing investment and expenditure) develop in 2025?

Base: N = 49

Sharply divided: Expected Marketing investments mirror the market outlooks.

CMOs in the Netherlands and the Middle East are also the most positive when it comes to marketing budgets - also optimistic: Spain, Italy and UK. In Austria, on the other hand, the situation appears to be particularly dramatic.

Marketing budget projection 2025

Numbers in percent

	DE (n= 220)	AT (n= 23*)	CH (n=185)	BELUX (n= 49)	NE (n =111)	ES (n=34)	FR (n= 93)	IT (n=76)	UK (n= 25*)	ME (n=19*)	Overall (n=835)
Top 3: will increase	31%	17%	28%	32%	57%	51%	32%	49%	44%	58%	37%
It will increase by more than 10%	7%	4%	4%	8%	10%	6%	6%	12%	4%	26%	7%
It will increase by 5 to 10%	9%	4%	7%	8%	30%	24%	10%	16%	16%	16%	13%
It will increase by max. 5%	15%	9%	17%	16%	17%	21%	16%	21%	24%	16%	17%
It will remain roughly the same	37%	35%	40%	35%	32%	38%	41%	28%	40%	16%	36%
It will decrease by max. 5%	10%	4%	13%	16%	6%	3%	9%	13%	8%	0%	10%
It will decrease by 5 to 10%	15%	30%	17%	12%	5%	3%	13%	7%	0%	16%	12%
It will decrease by more than 10%	8%	13%	2%	4%	0%	6%	5%	4%	8%	11%	5%
Bottom 3: will decrease	33%	47%	32%	32%	11%	12%	27%	24%	16%	27%	27%

Question: How will your marketing budget for 2025 (marketing investments and expenditure) develop?

Base: N = 835

*Evaluation is not representative due to the small number of responses.



3

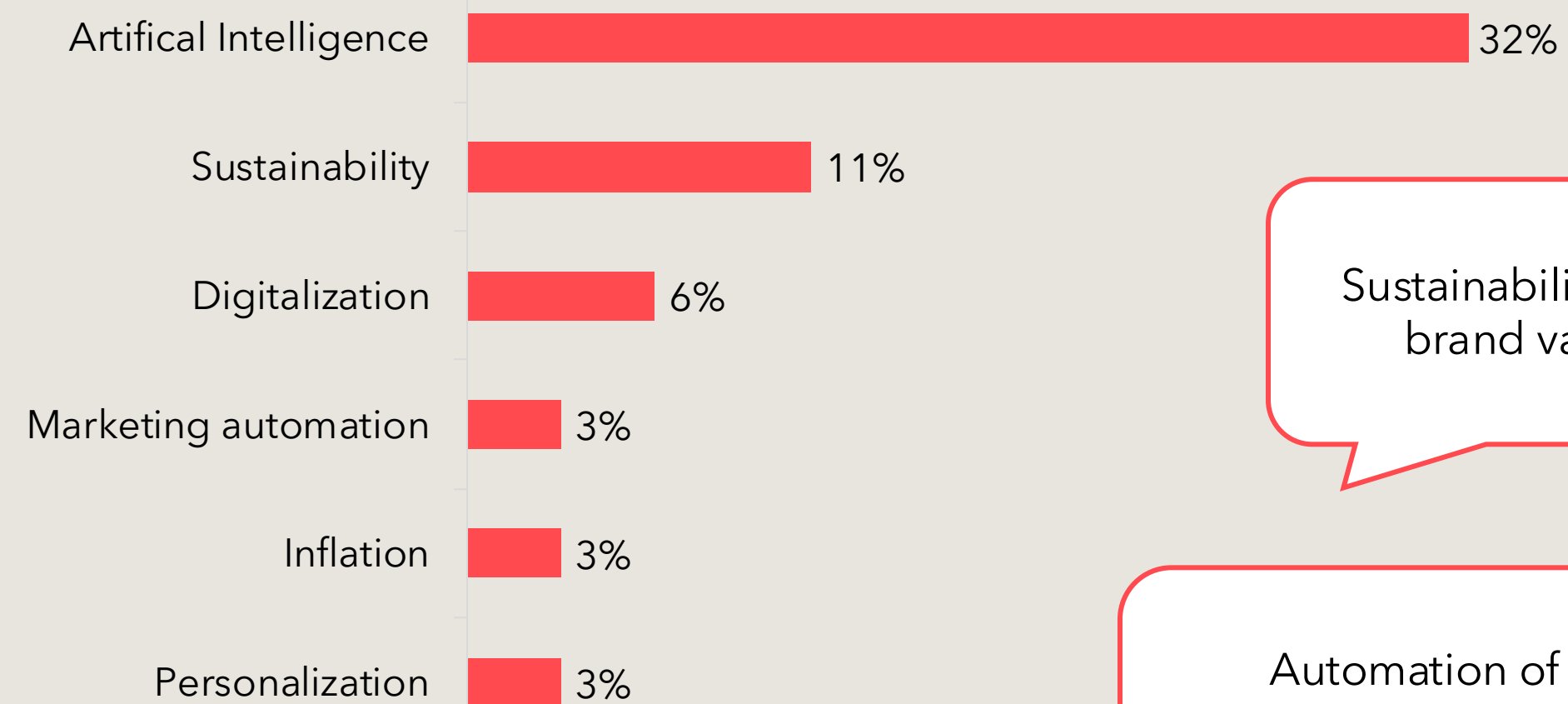
In your opinion, what is the hot topic for the marketing year of 2025?

Integrate or die: It's all about AI.

The beneficial use of AI is the most important topic for CMOs, followed by the planning and implementation of sustainability strategies.

What is the top theme for the marketing year 2025 for you?

Numbers in percent



Artificial Intelligence in the field of marketing communication.

Sustainability adds brand value.

Expand data intelligence further: Personalization, automation, and AI.

Automation of marketing processes while reducing lead times - here, the use of AI will already play a significant role in 2024.

Question: What is the top theme for the marketing year 2025 for you ?
Basis: N = 49



LET'S DISCUSS

Last year, **AI was already the hot topic**; in 2025, **sustainability** makes a comeback, paired with branding.

1° With AI as a major theme for 2025, what are your most promising AI initiatives?

2° How do you integrate AI and sustainability in your framework?

3° Is AI compatible with sustainability?



In my view, the key theme for marketing in both B2C and B2B will be mass personalisation driven by artificial intelligence (AI). The ability to deliver hyper-personalised experiences on a large scale, based on real-time data, will enable brands in both consumer and business to anticipate and meet the specific needs of their customers much more accurately. Another key issue will be the ethical use of data and privacy, which will remain critical in both environments as regulations evolve.

Lorena Mercedes
Senior Marketing Director Salesforce Iberia



4

How important do you think the following marketing trends will be in 2025?

Marketing Mission 2025: **Prioritizing efficiency in every aspect.**

How important do you think the following marketing trends will be in 2025?

Please rate by importance . **Numbers in Percent**

TOP 5 2025		Top2	TOP 5 2024		Top2
1	Data-based marketing (incl. cookieless future & first-party data)	86%	1	Databased marketing (incl. cookieless future & first-party data)	92%
2	Marketing ROI / marketing controlling / marketing analytics	84%	2	Artificial Intelligence, Machine Learning & Marketing Automation	88%
3	Customer journey management & personalisation	84%	3	Omnichannel marketing	87%
4	Content creation & optimisation, content marketing	82%	4	Emotional brand building	86%
5	Emotional brand building	82%	5	Content creation	86%

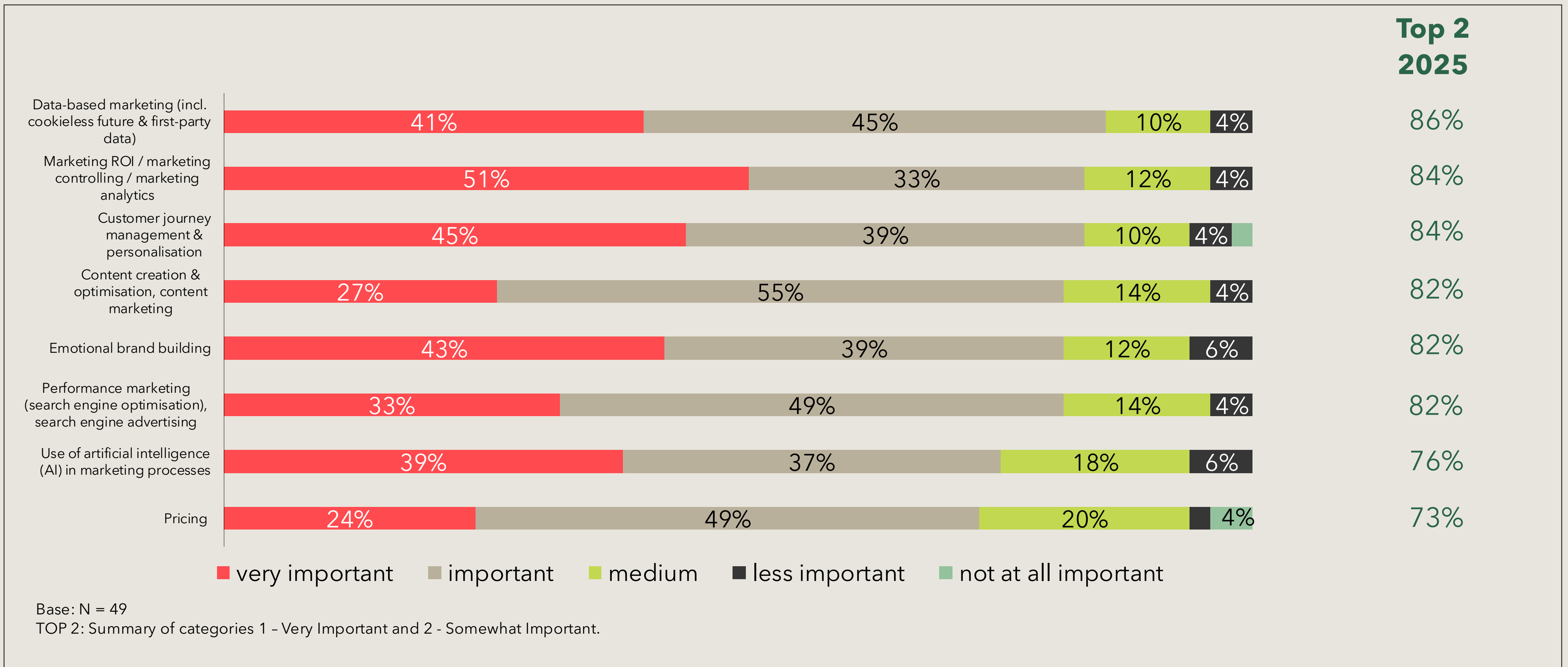
Base: N = 49 / 2024 BE+LUX: n= 51

TOP 2: Summary of categories 1 - Very Important and 2 - Somewhat Important

First things first: Get the processes straight! Impact follows.

How important do you think the following marketing trends will be in 2025?

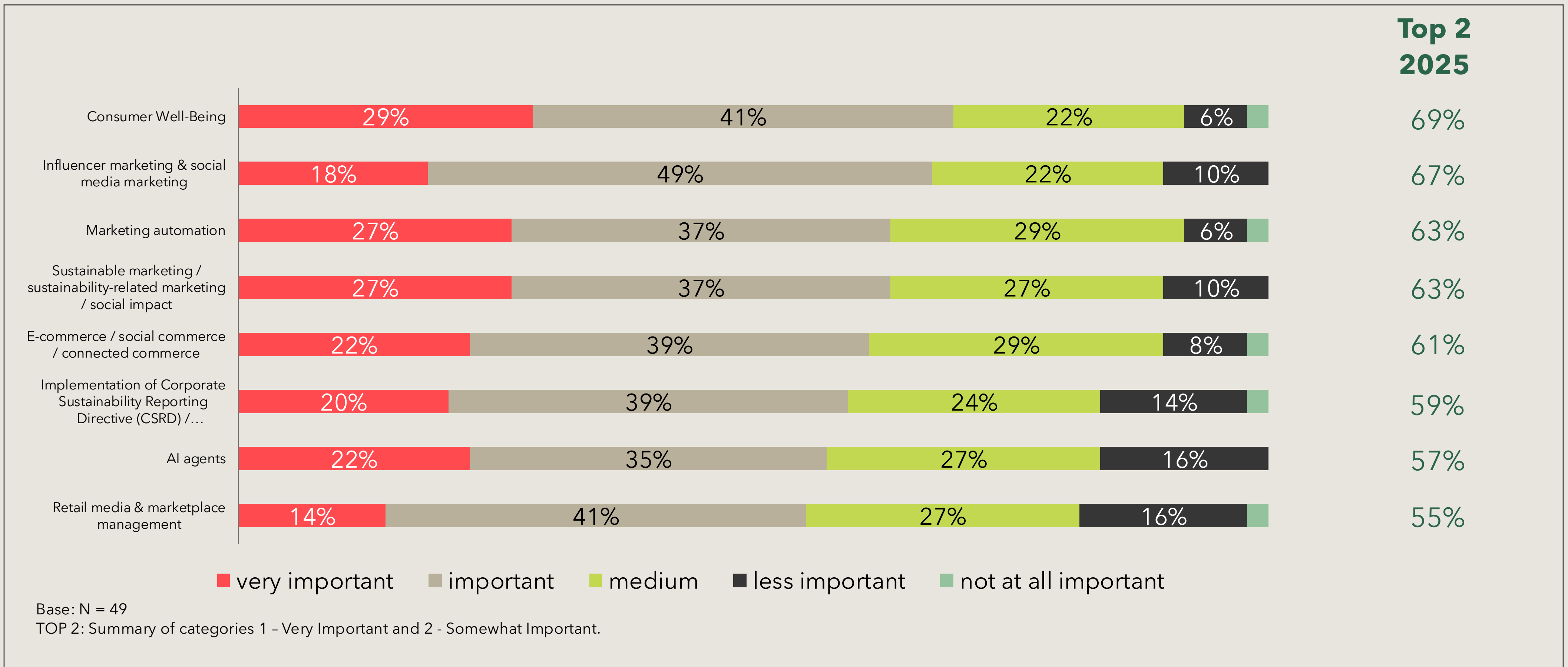
Numbers in Percent (Values below 5% not labeled)



First things first: Get the processes straight! Impact follows.

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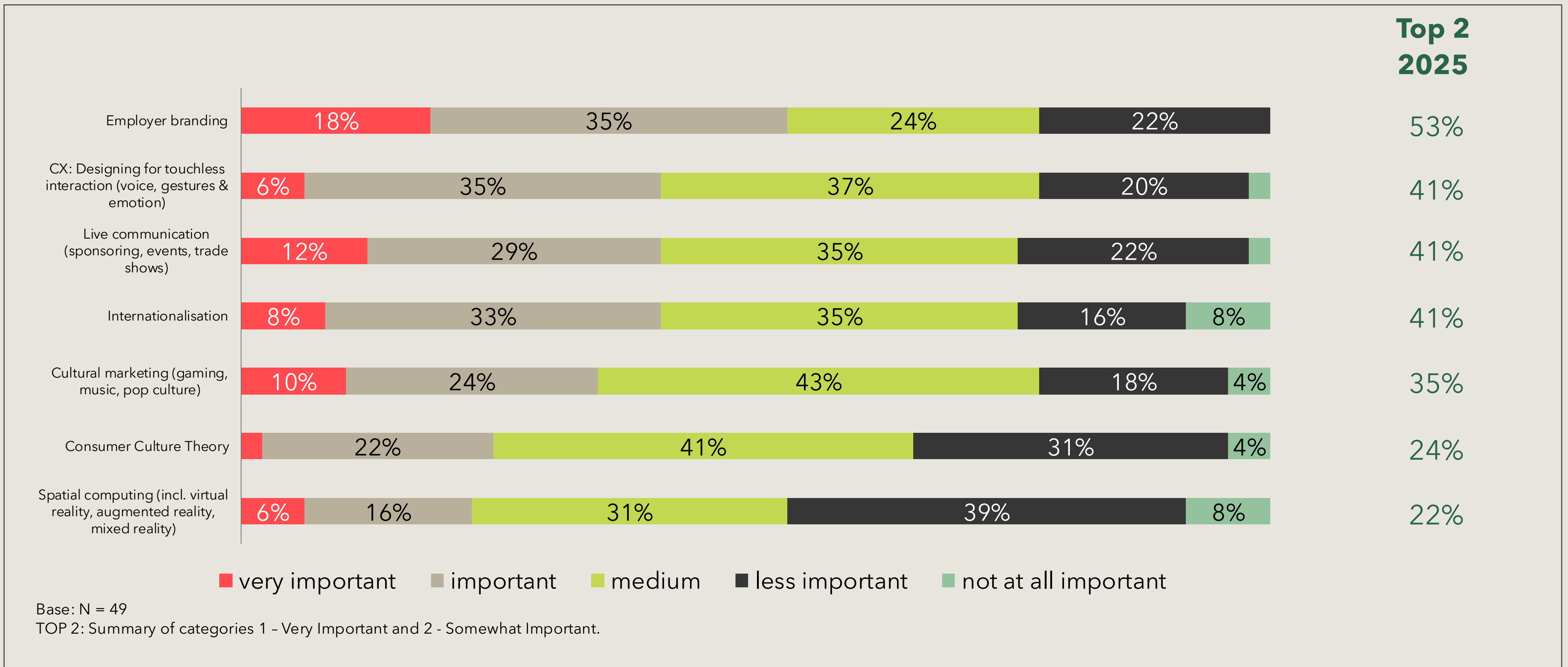
Numbers in Percent (Values below 5% not labeled)



First things first: Get the processes straight! Impact follows.

How important do you think the following marketing trends will be in 2025?

Numbers in Percent (Values below 5% not labeled)



Unity in diversity: AI is frequently mentioned, but not the top topic across all countries.

The differences between the individual countries are immense - nevertheless, it is clear that usability, personalisation, content and ROI are at the forefront.

Marketing budget projection 2025

Numbers in percent

TOP 2 Sorted by overall	DE (n= 220)	AT (n= 23*)	CH (n=185)	BELUX (n= 49)	NE (n =111)	ES (n=34)	FR (n= 93)	IT (n=76)	UK (n= 25*)	ME (n=19*)	Overall (n=835)
Use of artificial intelligence (AI) in marketing processes	85%	78%	79%	76%	86%	85%	80%	71%	76%	79%	81%
Customer journey management & personalisation	79%	91%	78%	84%	85%	71%	86%	68%	76%	89%	80%
Content creation & optimisation, content marketing	83%	87%	76%	82%	85%	71%	72%	63%	68%	89%	78%
Marketing ROI / marketing controlling / marketing analytics	75%	91%	71%	84%	83%	68%	71%	74%	92%	95%	76%
Emotional brand building	80%	78%	75%	82%	69%	74%	66%	63%	68%	89%	74%
Data-based marketing (incl. cookieless future & first-party data)	70%	74%	65%	86%	80%	74%	74%	63%	80%	95%	72%
Performance marketing (search engine optimisation), search engine advertising	68%	91%	66%	82%	77%	56%	66%	66%	56%	53%	69%
Marketing automation	69%	61%	69%	63%	73%	62%	54%	62%	64%	79%	66%
Employer branding	71%	52%	71%	53%	75%	35%	77%	53%	28%	53%	66%
Pricing	63%	61%	64%	73%	71%	56%	62%	68%	76%	63%	65%
AI agents	68%	48%	55%	57%	73%	79%	73%	58%	40%	58%	64%
E-commerce / social commerce / connected commerce	61%	61%	57%	61%	74%	59%	67%	55%	48%	74%	62%

Question: How will your marketing budget for 2025 (marketing investments and expenditure) develop?

Base: N = 835

*Evaluation is not representative due to the small number of responses.

=Highest Top 2 value
 =Second highest Top 2 value

Unity in diversity: One's trash is another's treasure.

The countries also disagree on specific topics such as Sustainable Marketing, Live Communication and Cultural Marketing. Once again, the Netherlands and Middle East seem to break a mold.

Marketing budget projection 2025

Numbers in percent

TOP 2 Sorted by overall	DE (n= 220)	AT (n= 23*)	CH (n=185)	BELUX (n= 49)	NE (n =111)	ES (n=34)	FR (n= 93)	IT (n=76)	UK (n= 25*)	ME (n=19*)	Overall (n=835)
Sustainable marketing / sustainability-related marketing / social impact	47%	61%	51%	63%	80%	56%	73%	66%	40%	42%	58%
Influencer marketing & social media marketing	62%	74%	51%	67%	62%	47%	69%	41%	52%	42%	58%
Consumer Well-Being	47%	61%	51%	63%	80%	56%	62%	55%	52%	58%	55%
Live Communication (sponsoring, events, trade shows)	62%	74%	51%	67%	62%	47%	38%	46%	48%	63%	48%
Implementation CSRD / ESG Reporting	47%	74%	54%	69%	0%	50%	41%	46%	32%	42%	47%
Retail Media & Marketplace Management	43%	57%	51%	41%	61%	59%	38%	39%	40%	32%	43%
Internationalisation	42%	48%	41%	59%	69%	53%	42%	51%	44%	32%	43%
CX: Designing for touchless interaction (voice, gestures & emotion)	51%	26%	34%	55%	53%	38%	25%	39%	20%	42%	38%
Cultural marketing (gaming, music, pop culture)	39%	61%	35%	41%	54%	53%	27%	43%	64%	63%	37%
Consumer Culture Theory	32%	26%	37%	41%	59%	56%	32%	39%	24%	63%	31%
Spatial computing (incl. virtual reality, augmented reality, mixed reality)	31%	39%	28%	35%	59%	44%	19%	24%	12%	53%	27%

Question: How will your marketing budget for 2025 (marketing investments and expenditure) develop?

Base: N = 835

*Evaluation is not representative due to the small number of responses.

=Lowest Top 2 value
 =Second lowest Top 2 value



LET'S DISCUSS

The trends highlighted between 2024 and 2025 remain almost identical but **with an added layer of AI.**

1° What key behavior changes have you observed in consumers, and how do you respond?

2° How do you adapt your communication to build trust with increasingly informed consumers?

*3° Which customer data is essential for delivering personalized experiences?
Does AI help you with this topic?*

*4° What new tools or methods do you use to measure campaign effectiveness?
Does AI help you with this topic?*



"The hot topic for the marketing year 2025 will be navigating market tension while prioritizing customer satisfaction, particularly in the energy sector, as businesses face challenges from reduced state subsidies and evolving grid fee structures that strongly impact operations."

Romain Mary
Head of Marketing
Enovos Luxembourg



5

What's your superpower? Which capabilities and skills does a CMO need to have these days to make their organisation fit for the future?

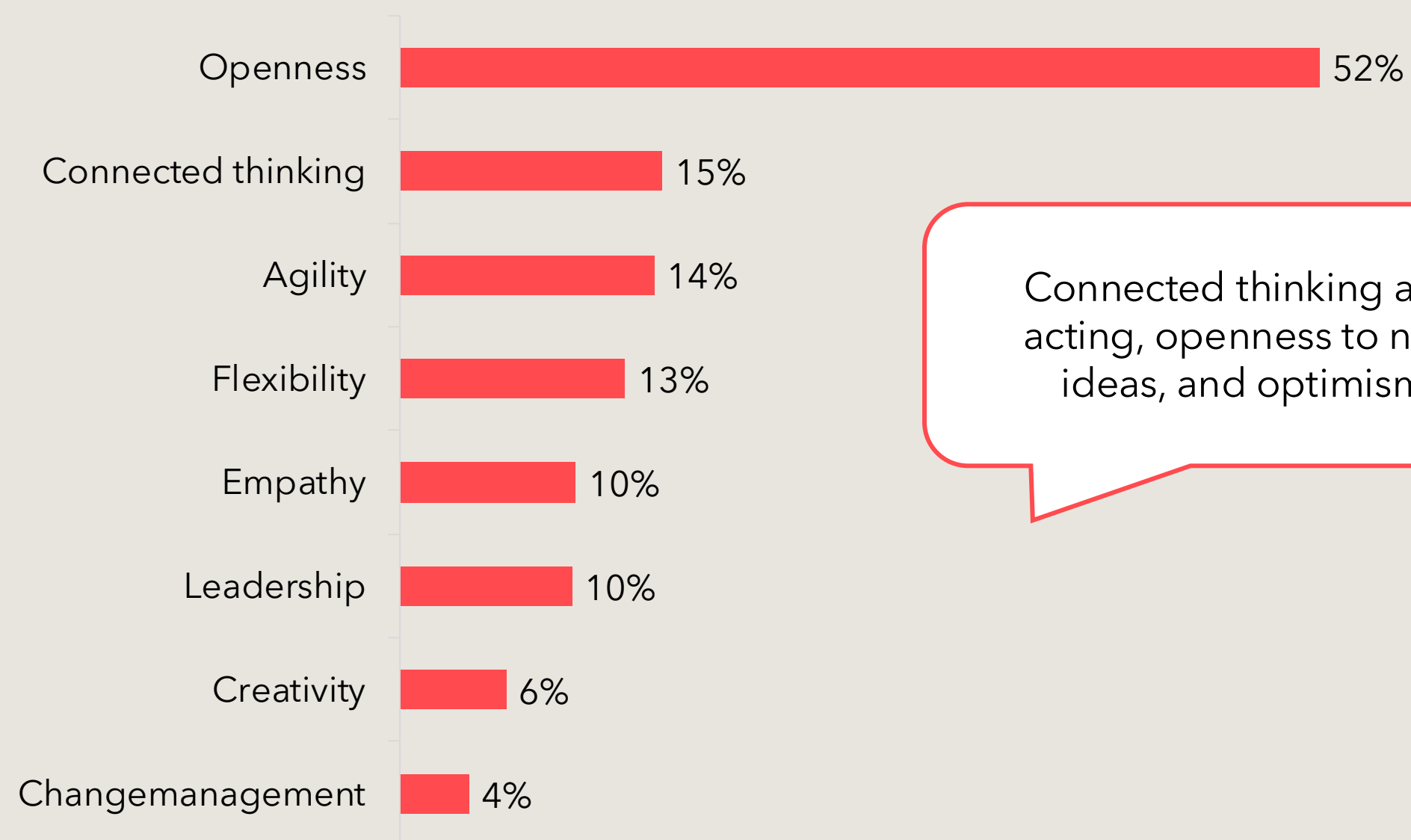


AI doesn't replace leaders – it makes visionary leadership more crucial than ever.

Successful CMOs need openness to topics and people and manage to inspire the organization with empathy and humor.

What's your superpower? What skills and abilities must a CMO possess today to make the organization future-proof ?

Numbers in Percent



Surprising creativity, an eye for the essential, and humor

Connected thinking and acting, openness to new ideas, and optimism

Capturing trends and making them applicable for the company

Creativity and innovation: Especially in a time of significant changes, innovative marketing approaches are in demand

Frage: What's your Superpower? What skills and abilities must a CMO possess today to make the organization future-proof ?
Basis: N = 430



LET'S DISCUSS

Last year, **empathy** was your superpower. This year, it's **openness** and **connected thinking**.

1° What do you mean by openness? Connected thinking? Innovation? Creativity? Humor?

2° How do you prioritize investments in 2025, balancing short-term actions with long-term strategies?

3° How can the CMO role evolve to drive innovation beyond marketing, in areas like CSR or corporate strategy?



I always prefer human qualities to hard skills. It's a philosophy that I'll be applying here, which is that in my opinion, a good marketing director should above all be humble and questioning.

The sector in which we operate is constantly changing, and if we claim to have an absolute answer to everything, I think we're wrong. The ability to be open to change, to learn from others (particularly the younger generations), is a strength that should enable marketing directors to feed their own creativity and ability to find the right levers.

Mathieu Rosan
Head of Marketing & Sales
ROCKHAL



6

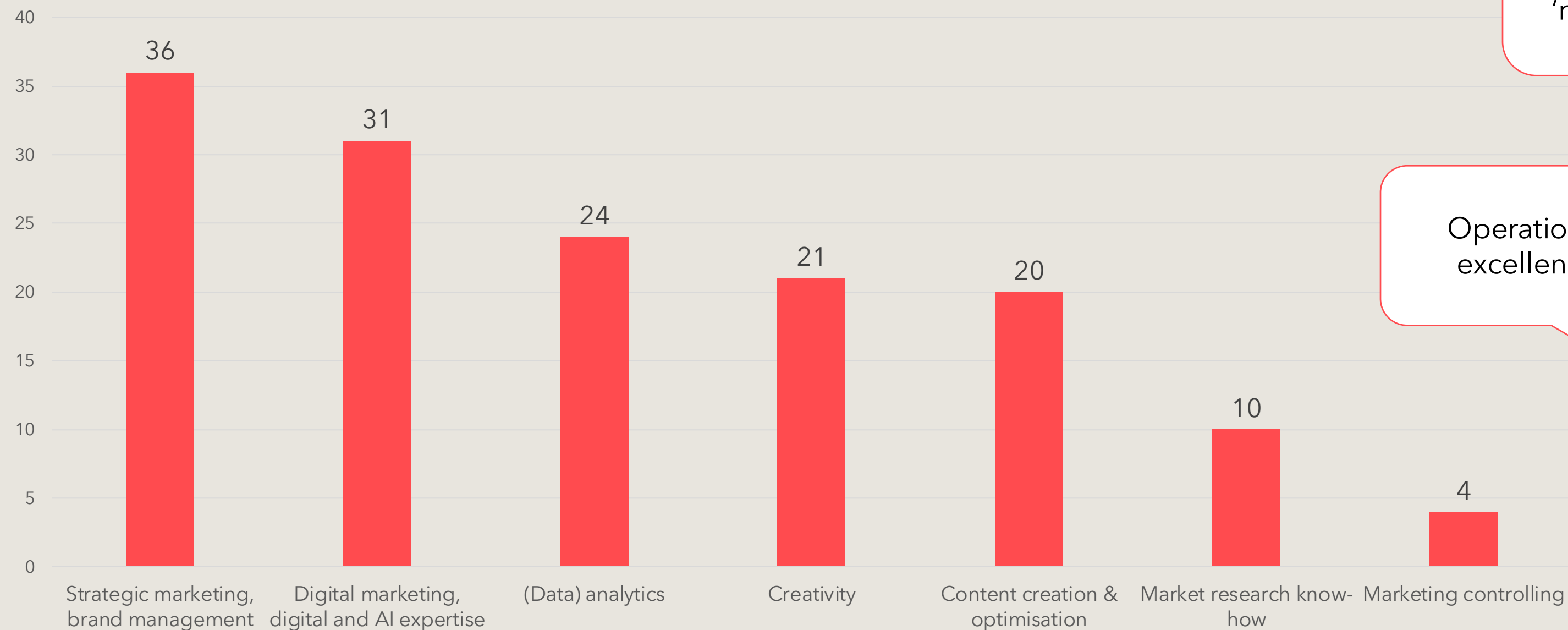
Which specialist skills should a successful marketing team have?

Broad discipline Marketing: CMOs trust in the A-Team.

In the future, the combination of up to date marketing know how, the use of digital tools, and above all, strategic approaches, is promising for success.

What professional competencies should be present in a successful marketing team?

Absolute figures.



Social skills: ability to work together, 'no silos' mentality

Operational excellence

Emotional intelligence

Customer knowledge and focus

Question: What professional competencies should be present in a successful marketing team?
Basis Top1: N = 49



LET'S DISCUSS

Last year, **creativity** was the top skill for your teams. This year, they need to demonstrate **more strategic and analytical capabilities.**

1° What skills need strengthening in your teams to meet 2025's trends (top 3 : AI, sustainability, digitalization)?

2° What practices make your teams and strategies more agile?



I expect from a marketing team advanced knowledge in digital strategy and AI (even if it is impossible to follow everything as the subject is vast) and the analytical aspect of the actions carried out.

Anne-Sophie Diard
Head of Communication
POST



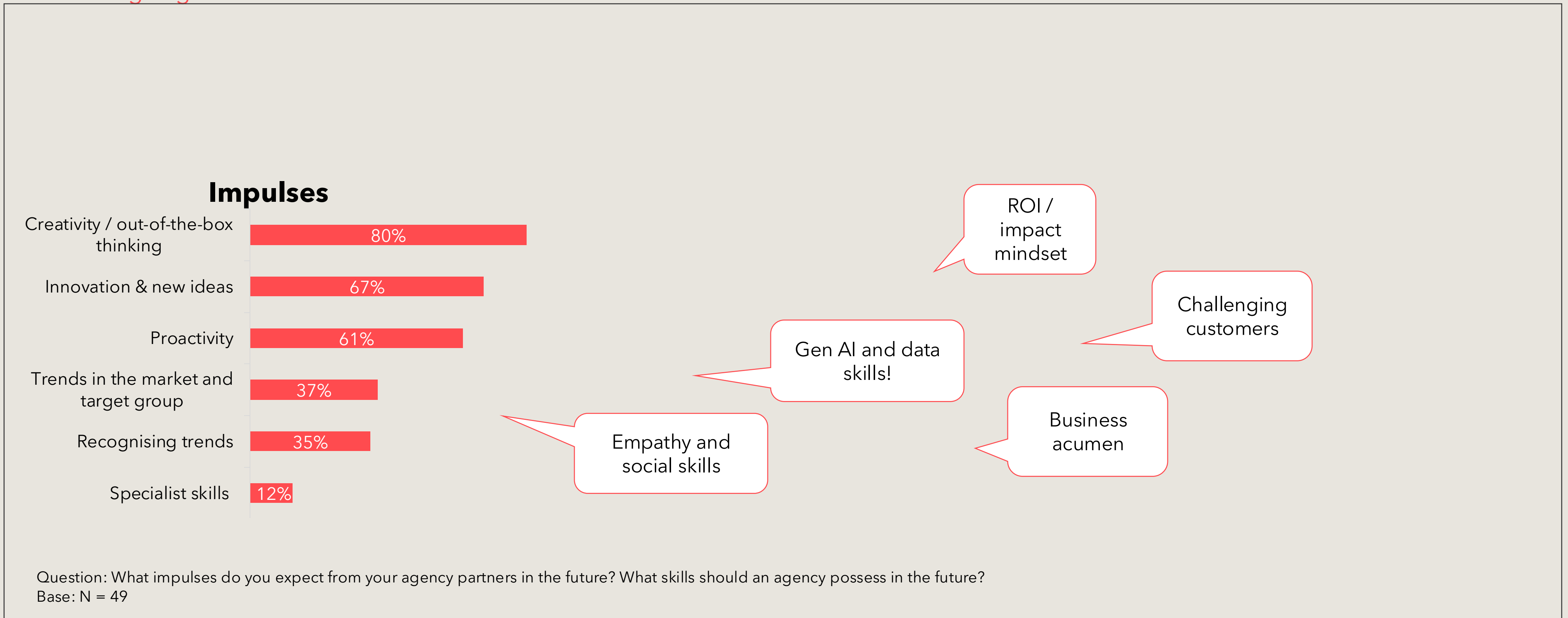
7

What kind of inspiration do you expect from your agency partners in the future?

Inspiration & Innovation? Let agencies handle that.

What impulses do you expect from your agency partners in the future? What skills should an agency possess in the future?

Percentage figures



First-time consensus: Creativity wins!

Being creative, innovative and coming up with new ideas - that's what makes CMOs happy. Only in the UK do they prefer their agencies to be proactive rather than creative.

Agency inspiration 2025

Numbers in percent

	DE (n= 220)	AT (n= 23*)	CH (n=185)	BELUX (n= 49)	NE (n =111)	ES (n=34)	FR (n= 93)	IT (n=76)	UK (n= 25*)	ME (n=19*)	Overall (n=835)
Creativity / out-of-the-box thinking	78%	78%	77%	80%	60%	65%	66%	62%	56%	68%	71%
Innovation & new ideas	65%	70%	63%	67%	66%	76%	53%	51%	60%	79%	63%
Proactivity	60%	74%	44%	61%	49%	59%	48%	53%	64%	74%	54%
Trends in the market and target group	56%	61%	42%	37%	50%	56%	34%	51%	40%	53%	48%
Recognising trends	40%	26%	36%	35%	33%	18%	39%	53%	48%	42%	38%
Specialist skills	10%	9%	14%	12%	11%	9%	15%	4%	12%	16%	11%
Other	6%	4%	6%	14%	5%	3%	3%	4%	4%	5%	6%

Question: What kind of inspiration do you expect from your agency partners in the future?

Base: N = 835

*Evaluation is not representative due to the small number of responses.

=Highest value
 =Second highest value



LET'S DISCUSS

As last year, you expect **creativity** and **inspiration** from your agencies, but...

1° What type of creativity do you expect from them?

2° Is insourcing marketing tasks an opportunity or threat to agency-client collaboration? How should agencies respond?



While marketing budgets in Luxembourg and worldwide are increasingly constrained, AI is being utilized more frequently, driving new ways of thinking. Far from being merely a productivity tool, AI is emerging as a powerful source of creativity and inspiration.

Nevertheless, the human factor and the concept of “share of soul” remain indispensable to our brands.

Laurent Grass
Managing Partner
LOLA x Serviceplan Group Luxembourg



Key Insights

AI above all.

In 2025, AI will be even more important than it is now.

Trends in 2025:

Efficiency is key, impact follows.

Regarding the economic situation, CMOs expect a **standstill**.

When it comes to marketing budgets optimists are still in the majority but becoming fewer.

Results vary widely across countries in terms of economic situation, marketing budgets, and trending topics.

Multiple challenges demand strong CMO leadership.

CMOs build their teams broadly, covering all areas of expertise in-house.

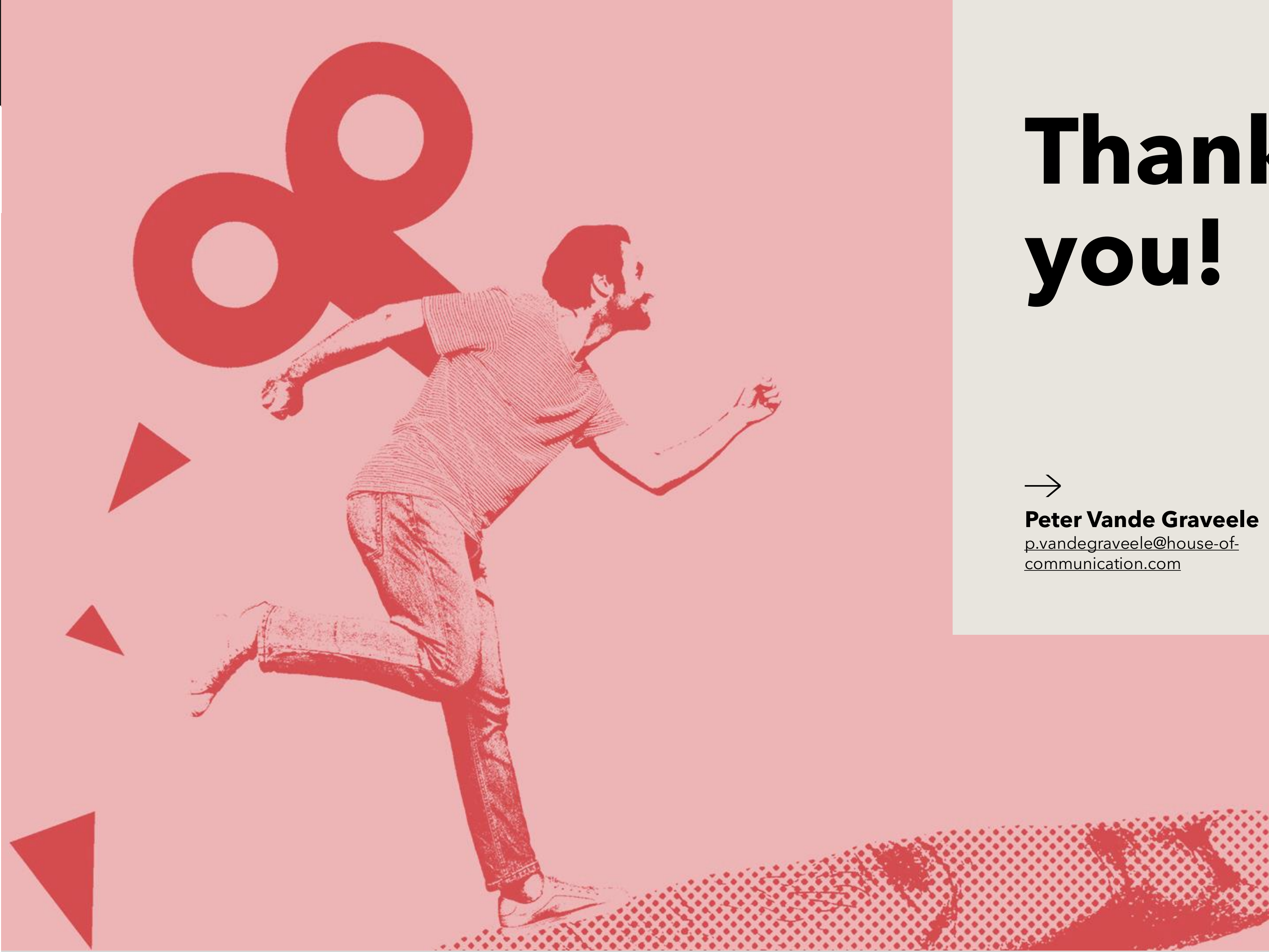
CMOs expect their agencies to do the **creative heavy lifting**, proactively at best.



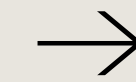


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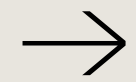


Thank you!



Peter Vande Graveele

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