

Five Trends Shaping Marketing in 2026

How economic pressure, changing consumers, and AI are redefining the role of marketing

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Deloitte.
Digital





Marketing as we know it is over.

AI rewrites creativity. Trust becomes currency. Channels collapse. Pressure intensifies.

What worked yesterday won't survive tomorrow.

From ambition and innovation to efficiency and discipline

Economic pressures are reshaping marketing in Europe. Constraints, not innovation, define the European market as growth slows, purchasing power weakens, and investment in marketing falls. Adaptation to AI and changing consumer behaviour will determine who converts pressure into advantage.

OBSERVATION

IMPACT

Prolonged low-growth economic environment

European economies are in a sustained low-growth cycle with uneven demand and fragile confidence across markets



Planning horizons shorten and ROI expectations rise
Marketing is required to deliver measurable impact within tighter financial limits and shorter timeframes

Inflation curbs consumers' purchasing power

Inflation across the EU remains above pre-pandemic levels, influencing how consumers evaluate price, value and necessity



Consumers are increasingly selective about where they spend
Consumers reassess brands more frequently, prioritising value and relevance over habit or familiarity.

Tighter budgets under intensified CFO scrutiny

Marketing budgets face stronger CFO oversight and demand finance-grade measurement



Efficiency and accountability outweigh ambition
Spend is judged more strictly on measurable return, with lower tolerance for long-term or low-visibility investments.

Category growth is becoming uneven and polarised

Some categories stagnate or contract, while others split between value and premium as mid-tier demand erodes.



Strategic clarity and segmentation matter more
Broad, one-size-fits-all marketing loses effectiveness; success increasingly depends on differentiated approaches in true growth categories.

CUSTOMERS ARE CHANGING

Customers are changing faster than most enterprises can adapt. What people value, how they make decisions, and who they are influenced by, are all in flux. Technology is accelerating these changes, compressing decision cycles and raising expectations simultaneously. The result is not confusion, but selectivity.

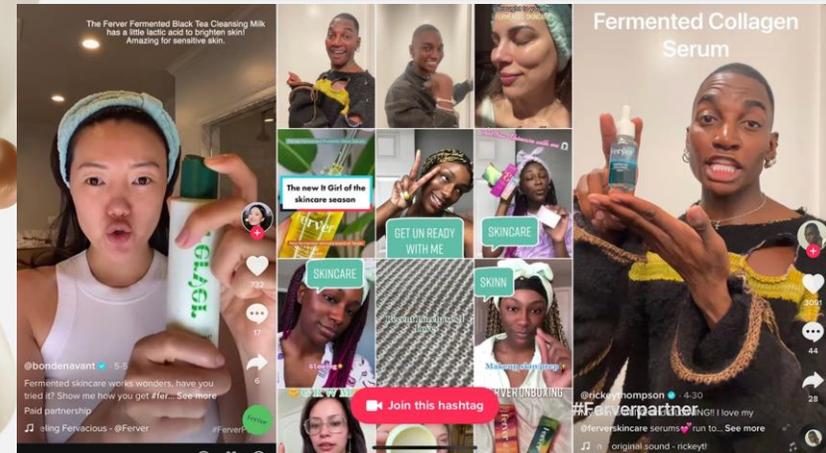


The New York Times

STUDENT OPINION

Are You Tired of Influencers?

Do you trust the product recommendations you see on social media? Or are you increasingly skeptical of people trying to sell you stuff online?



There's too much advertising on social media, 6 in 10 respondents tell Hootsuite

Hootsuite's Social Media Consumer Report is based on a survey of more than 6,000 respondents between the ages of 18 and 65 in the U.S., Canada, U.K. and Australia.

EAT, SLEEP, BUY, DIE



Advantage shifts to brands who adapt to new consumer behaviors

Relevance, not reach, drives brand discovery. In today's environment, understanding how consumers think, compare, and prioritise value is the foundation of competitive advantage

Discovery is shifting



Brand discovery is increasingly shaped by content, recommendations and communities, rather than deliberate search alone. People of all ages are exposed to brands through social platforms, creators, and peer influence, before actively seeking them out.

60%

of consumers say social content, recommendations, or communities influence how they discover new brands, with search increasingly used for subsequent validation.

More deliberate, not disengaged



People are spending more carefully, rather than disengaging from brands. Higher prices and ongoing uncertainty are driving more comparisons, fewer impulse purchases, and sharper decisions about what is essential, versus optional.

40%

of consumers report cutting back on discretionary categories, such as personal and home care.

Experiences shape expectations



Brands are judged against the best experience people encounter anywhere, not category norms. Ease, relevance, and consistency across online and offline touchpoints are now assumed, not differentiators.

20%

Improvement on customer satisfaction and conversion metrics for brands that deliver strong end-to-end customer experiences.

Value is reinterpreted



Despite the economic pressures, price alone doesn't explain why a brand wins. People are still willing to pay more when the benefit feels clear, relevant or personally meaningful, but only when the value is easy to justify.

43%

of brand interactions are perceived as personalised, potentially highlighting a gap between effort and perceived value.

AI continues to be over-simplified in marketing



Five truths of AI in marketing

01.

AI WILL DECIMATE PRODUCTION COST

Big productivity gains have already been realised (e.g., +200% copy capacity; ~60% less manual design time), along with dramatic falls in the cost per image (≈€45 → €4-6).



02.

AI CAN BOOST BUT ALSO WRECK TRUST

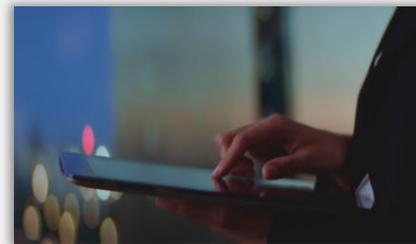
Hyper-personalised content outperforms basic content (site conv. 2.9% vs 0.5%; email CTR 3.4% vs 1.8%); high VTRs seen in personalised video ads (44%). But only 42% of consumers trust businesses to use AI ethically.



03.

OFTEN AI INITIATIVES FAIL

Only 10% of organisations are realising significant ROI from agentic AI, according to Deloitte's 2025 survey of 1,854 executives across EMEA.



04.

VALUE UNLOCKED BY ORGANIZATION

Scale requires an AI Factory/CoE with a control layer, composable tech (DAM, CDP, APIs, measurement) and clear commercial models.



05.

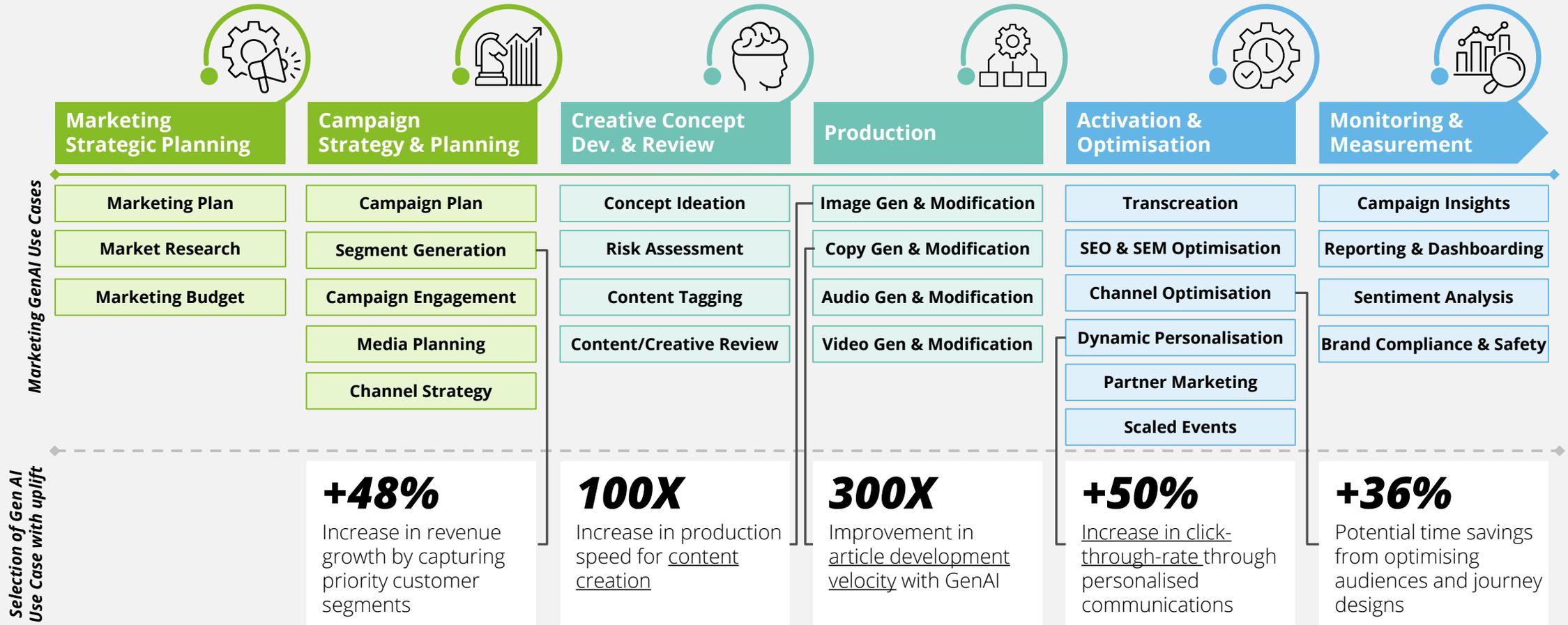
IT TAKES TIME TO REALIZE VALUE

85% of organisations have increased their AI investments in the past 12 months, with 91% planning further increases, although achieving satisfactory ROI often takes 2-4 years.



AI will change how marketing works, not just what it does

As consumer behaviour becomes more deliberate and expectations rise, marketing systems must adapt in real-time. GenAI, automation, and real-time data platforms are transforming how marketing works, who it serves, and how quickly decisions must be made.



CMOS FACE NEW REALITIES IN A NEW WORLD

Business leaders expect CMOs to deliver growth, accountability and transformation—without the control, resources, or systems required to do so.



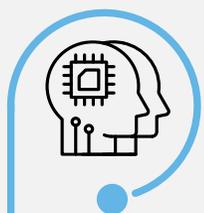
33%

of CMOs prioritize profitability, compared with 67% of C-suite peers



64%

of CMOs identify proving marketing's value to the business as their biggest challenge



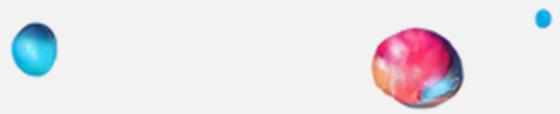
1 in 6

marketing activities use AI today. That figure is set to more than double in the next 3 years



62%

of CMOs identify finding the right external people as their biggest talent challenge



Meet the moment, prepare for the future

In a time of rapid evolution, prioritise investments in marketing tech (MarTech)

Investing in marketing technology can pay off

- Organisations that invest more in MarTech than working media (events, digital ads, sponsorships, etc.) see an 18% greater sales lift from marketing, and 7% greater revenue growth overall, than organisations that invest more in working media than MarTech.

There's a gap between expectations and budgets

- There is a disconnect between how marketing budgets are set and what enterprise leaders expect. While CEOs and CFOs recognise that marketing can be a powerful driver of growth, many still insist that CMOs do more with less. In fact, at least 61% of marketing budgets are based on enterprise-level revenues and budgets, or prior spend. This leaves marketers with limited control over budget inputs—even when they can deliver a measurable return on investment.

Source: Deloitte CMO Survey 2025

5 Marketing trends set to shape 2026, and beyond

Slower growth, tighter budgets and more regulation put pressure on the old marketing playbook. AI and real-time data are becoming core assets, not optional extras. CMOs must fix legacy systems, close data gaps and build new skills. Those who act now will gain a lasting advantage.

01

AI BECOMES THE OPERATING SYSTEM OF MARKETING

AI provides marketing with an embedded operating system that accelerates decisions, augments creativity, and personalises at scale.

02

PERFORMANCE, ROI & THE END OF BLIND MARKETING SPEND

Marketing is now measured as a line of business. Increasing CFO scrutiny forces finance-grade measurement and accountability.

03

TRUST, BRAND & PURPOSE BECOME ECONOMIC ASSETS

With digital trust eroding, brand equity and demonstrated purpose become direct drivers of commercial performance.

04

CHANNEL FRAGMENTATION, REINVENTION OF BRAND DISCOVERY

Mass reach fractures across AI-driven search, retail media and niche creators, changing how customers discover and engage with brands.

05

THE MARKETING ORGANISATION IS BEING REBUILT

CMOs must reorganise skills, ways of working and culture to support continuous AI-enabled cross-functional delivery.

1. AI becomes the Operating System of Marketing

GenAI is no longer a bolt-on: it's reshaping how marketing operates. As AI creates content, informs decisions and shapes customer experiences, CMOs must architect systems in which human creativity and machine intelligence work in tandem.

WHAT WE SEE

Generative AI is transitioning from isolated pilots to become an end-to-end orchestration engine, enabling everything from productivity boosts to real-time personalisation. But as decision cycles compress and automation scales, CMOs must actively manage risk, creativity and trust.

PRIMARY DRIVERS

- 01** | **Content demand has outpaced human production capacity:** As personalisation across channels has exploded, marketing teams and budgets have not grown at the same rate.
- 02** | **AI quality crossed a usability threshold:** Generative tools now produce output good enough for real customer-facing use, making adoption economically rational rather than experimental.
- 03** | **Executive pressure to unlock productivity gains:** AI is one of the few levers that can deliver measurable efficiency improvements, without adding headcount.

ACTIONS FOR CMOs

Free senior marketers from execution work so they focus on growth strategy and prioritisation.



Pick two workflows to automate end-to-end in 90 days, such as email copy and versioning or paid ad creative testing. Eliminate manual steps entirely, not partially.



Set hard productivity targets per team and link AI usage directly to measurable time saved or cost avoided, not "experimentation".



Only mandate human approval for defined risk points, such as final client-facing copy and regulatory claims. Everything else flows automatically.

2. Performance, ROI & the End of “Blind” Marketing Spend

Marketing is now under CFO-level scrutiny. Budgets are treated as investment portfolios, not creative costs and only the metrics with a clear link to business value will survive.

WHAT WE SEE

As growth slows and budgets tighten, CMOs must justify every euro they spend. Expectations have shifted toward proven marketing performance and strict financial accountability. CMOs who speak the financial language of ROI, customer value, and revenue attribution will gain influence and funding.

PRIMARY DRIVERS

- 01 | Tighter budgets and economic uncertainty:** Flat or declining marketing budgets have forced closer scrutiny of spending across all marketing domains including media and technology.
- 02 | Marketing expected to operate like an investment portfolio:** CFOs and finance teams now demand clear links between spend, revenue and payback periods. Increased accountability on capital allocation.
- 03 | Short-term performance data dominates decision-making:** Now accustomed to always-on digital metrics, leaders expect fast, measurable returns.
- 04 | Marketing as growth engine:** While only 33% of enterprises have KPI targets for marketing ROI, this figure will rise as boards demand a measurable contribution to revenue.

ACTIONS FOR CMOS

Reposition marketing as a capital allocator, not a cost center.



Align on one ROI model, endorsed by the CFO, even if it is imperfect for some use cases: consistency matters more than precision.



Kill or fix the bottom 20% of spend every quarter. Make this reallocation visible to leadership to clearly demonstrate discipline.



Report marketing in terms of revenue, not channel metrics. Include customer acquisition cost and payback period, and nothing else, in executive reviews.

3. Trust, Brand & Purpose Become Economic Assets

In a world saturated with AI-generated content, trust and authenticity are becoming scarce and valuable. Brands that can concretely deliver (rather than just promise) on their purpose will command loyalty and premium pricing, and will build resilience.

WHAT WE SEE

Deepfakes, misinformation, and privacy concerns are eroding digital trust. Regulators and consumers now demand greater transparency and ethical use of AI. Strong brands are shifting from storytelling to proof-based marketing—anchoring their value proposition in verifiable trust, consistent behaviour, and responsible data use.

PRIMARY DRIVERS

- 01** | **Consumers increasingly factor values into purchase decisions:** Trust, ethics and social impact influence loyalty and willingness to pay, especially among younger demographics.
- 02** | **Digital transparency exposes inconsistency instantly:** Social media and online scrutiny make it risky for brands to overstate claims and difficult to hide operational gaps.
- 03** | **Data misuse and AI anxiety are eroding confidence:** High-profile privacy breaches and opaque use of AI have made customers more cautious and sceptical of brands' intentions.

ACTIONS FOR CMOS

Proactively turn trust into a competitive moat, while others rely on reactive short-term tactics.



Replace vague purpose language with 2-3 measurable commitments, such as reduce packaging plastic by 20% by 2027



Work with content creators to deliver raw, unscripted transparency that mirrors the real customer experience, not high-gloss lifestyle endorsements.



Build content for AI-driven discovery, not just human audiences. Structure for algorithmic visibility and put clear governance in place to protect ethics and brand integrity.



4. Channel Fragmentation, Reinvention of Brand Discovery

There is no longer a dominant channel. As consumers discover, engage, and transact across a fractured landscape, CMOs must orchestrate presence, not dominance.

WHAT WE SEE

Mass reach is increasingly unachievable as discovery fragments across AI-driven search, retail media, creator ecosystems and niche communities. Brands must orchestrate many small, culturally-relevant touchpoints, instead of single broad campaigns. Success will hinge on creative agility, authentic platform-native formats and measurement of micro-conversions. Failure, through the pursuit of scale, will erode a brand's cultural relevance.

PRIMARY DRIVERS

- 01** | **Emergence of new high-growth channels:** Retail media networks are exploding with EU spend nearing €18B in 2025, redirecting spend from other channels.
- 02** | **Social-first discovery and creator-led influence:** Consumers increasingly navigate brands through social feeds, creators, and communities driving a 72% increase in influencer marketing spend.
- 03** | **Omnichannel complexity replaces channel hierarchy:** No platform dominates. Marketers must navigate a fragmented mix of AI agents, CTV, social, and messaging to reach today's audiences.
- 04** | **Rising bar for omnichannel personalization:** AI-driven experiences have raised expectations for seamless, hyper-relevant engagement across channels forcing brands to deliver personalization at every touchpoint.

ACTIONS FOR CMOs

Connect channels to outperform competitors managing them as silos.



Identify three “must win” channels per audience segment. Avoid a “just in case” strategy that spreads budget thinly.



Design campaigns from the perspective of the customer journey, not the channel. Create a single narrative that is adapted, rather than reinvented, for each platform.



Hold 10% of spend for quarterly channel reallocation. Use it only based on performance data, not trends or hype.

5. The Marketing Organisation is Being Rebuilt

Legacy organisations can't keep pace with AI, channels, and performance demands. In future, marketing teams will be agile, cross-skilled, and designed for reinvention that cater to all facets of marketing from price to promotion, supply and product.

WHAT WE SEE

CMOs' organisations are under pressure with talent gaps, tech overload, and operating model strain stalling progress. Traditional departments need to be replaced with fluid teams, embedded tech, and AI-augmented workflows. Agility is no longer optional, it's essential for speed and control. The function itself is rapidly evolving.

PRIMARY DRIVERS

- 01 Skills gap outpaces hiring capacity:** Demand for data, AI, and automation skills is outstripping supply. This limits marketing's ability to scale capabilities and deliver innovation.
- 02 Legacy structures slow decision-making and execution:** Siloed structures and slow approvals hinder the agile, real-time execution modern marketing demands.
- 03 Talent expectations have evolved:** Employees prioritize growth, flexibility, and purpose. Without them, teams face higher churn and lower engagement.
- 04 Content demand overwhelms capacity:** With a 93% surge in content needs, teams struggle to produce enough high-quality, channel-specific assets at scale.

ACTIONS FOR CMOS

Begin to adopt agentic AI and create a faster and more capable marketing organisation.



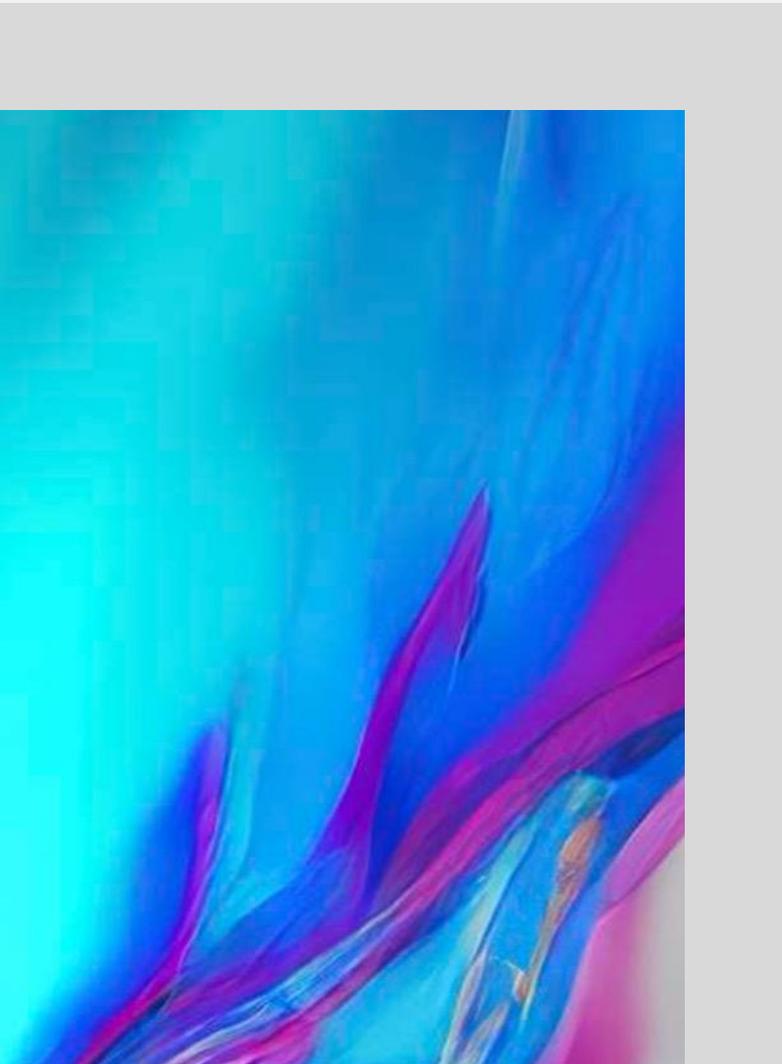
Start with educating your team on agentic AI opportunities, risks and processes best-suited for agentic AI implementation.



Strengthen the marketing function within the organisation driving more influence in pricing, product and (traditional) marketing capabilities.



Redesign teams around outcomes, rather than functions. Tie growth squads to revenue or retention targets.



Thank you

Get in touch with the experts



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The background of the image is a vibrant, abstract composition of flowing, liquid-like colors. On the left, a bright yellow band curves downwards. The central and largest portion is a deep, saturated blue. To the right, a magenta or pinkish-purple band flows downwards, meeting a lighter, almost white area at the top right. The overall effect is one of dynamic movement and modern digital aesthetics.

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