

Moving the Agentic Marketing Transformation from Illusion to Reality

BCG CMO Survey 2026

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Marketing has become a highly visible frontier of enterprise AI. In our 2026 global survey of 300 chief marketing officers (CMOs), leaders tell us that they are in the driver's seat of their own transformation. (See the Sidebar, "About This Survey.") Unlike many enterprise AI agendas led from the CEO's office or by the strategy function, AI investment in marketing is being driven by marketing itself. Roughly half of CMOs say that the marketing organization now leads AI investment decisions in the function, compared with 14% led by the CEO or board and 15% led by strategy. That is a meaningful shift: marketing is no longer waiting to be transformed. This is not the case for most other functions. BCG's AI Radar shows that 72% of CEOs still see themselves as the main decision maker on AI across the enterprise.

— About This Survey

BCG surveyed 300 CMOs globally across business-to-consumer and business-to-business sectors. We supplemented the resulting findings with structured interviews of 50 CMOs and with observations drawn from BCG client engagements. Statistics cited in this report come from the survey unless explicitly noted as engagement-based observations. A detailed methodology, including segmentation criteria for the maturity tiers, is available on request.

CMOs are feeling the pressure that comes with greater accountability and the elevation of AI on the CEO agenda: 94% of CMOs say that CEO expectations of marketing have increased significantly over the past two years. In our interviews, many CMOs described a growing sense that marketing is expected not merely to adopt AI, but to lead with it.

A beauty company CMO captured the growing competitive pressure around AI adoption: “Seeing how tech and media companies are already running autonomous campaigns, I am racing to avoid a future where we lose ground to agent-native beauty startups that use these new tools to take share.” An insurance company CMO described mounting pressure from senior leadership to accelerate AI adoption: “Our Board and CEO are challenging us to move faster on our AI agenda, and I have positioned marketing as one of two functions to lead the change, in partnership with our Chief Technology Officer.” A consumer packaged goods CMO added, “I am using the current enterprise reorganization efforts to accelerate change, instead of just making the tactical cuts.”

Indeed, expectations for the CMO now focus on both growth acceleration and productivity improvement. With greater ownership comes the burden of proof, and organizations increasingly expect CMOs to deliver measurable AI-driven impact at a moment when most enterprises are not yet equipped to scale it. To address this challenge, one restaurant company CEO built an agentic control tower to monitor business trends and opportunities in real time so that marketing and operations teams could respond to emerging trends as they happen. Cross-functional use of agentic AI illustrates the value creation opportunities that emerge when organizations think holistically and connect data signals across silos.

For marketing leaders, the political capital available for investment is high, and with it, the financial capital as well. While the level of investment varies across geographies and industries, 43% of CMOs report that their AI investments in marketing exceeded \$15 million this year (compared with 28% last year). But the runway is short. Successful CMOs will convert the current optimism into demonstrable, defensible enterprise impact before CFOs lose patience.

The Marketing Transformation Illusion

The clearest way to read this year's data is to consider two numbers side by side:

- 96% of CMOs report significant end-to-end AI transformation of their function.
- 42% admit that they still use GenAI only as an assistant for individual tasks in a handful of workflows.

Both statements can be true, and most marketing sits in the space between them today.

We grouped respondents into three maturity tiers on the basis of how they actually deploy AI across the function, rather than on their stated ambition, budget, or self-reported sophistication. The criteria that we used to determine where CMOs fell in these tiers included the number of workflows that agents touch, the extent to which those workflows have been transformed, the way agents are orchestrated to work together, and the impact of the changes on campaign productivity and ROI. The maturity tiers are as follows:

- **The Leaders (32%).** One group—just under a third of CMOs—is pulling ahead. These leaders are deploying AI agents in individual workflows across strategy development, insights, briefing, content creation, activation, and optimization. Even more importantly, they are pairing agents with human oversight to orchestrate multiple newly designed workflows, reimagining their potential in the world of AI. They are investing heavily in tech but also in upskilling their internal teams. Leaders are also restructuring their agency and tech partner ecosystem. And a subset of the group, approximately 8% of CMOs, are starting to connect multiple agents to run certain types of campaigns autonomously.
- **The Followers (26%).** CMOs in the second maturity tier are racing to turn the illusion of AI transformation into reality, but they have a lot of hard work ahead of them. Followers are scaling beyond pilots in one or two domains, most commonly in content development or media optimization. They have some workflow redesign underway, but their talent and tech stack lag the ambition.
- **The At-Risk (42%).** For nearly half of CMOs, the AI transformation is at risk of becoming illusory. These at-risk CMOs use GenAI only to assist humans with specific tasks and in specific limited steps in a few workflows. Most of them have piloted many use cases and seen measurable productivity gains in content development, insight generation, or even media optimization and bidding, but they have not yet scaled these pilots across the business. They also haven't transformed their operating model or martech stack, and they face critical talent gaps.

Generating Real Value

The investment picture confirms how seriously CMOs are taking the moment. Our survey found that 43% are significantly increasing AI investment—and within this group, 41% are dramatically increasing investment in end-to-end workflow orchestration.

The first wave of marketing AI spending went disproportionately to individual and sometimes disconnected tools—a content generator, a personalization engine, a chatbot—in somewhat disjointed fashion. The second wave focused on the connective tissue, enabling smoother transitions in processes and better tradeoffs in decision making to drive stronger business results. Investment priorities shifted toward the foundations required to scale: data, measurement, technology, digital customer experience, and talent.

The third wave, now getting underway, is about building the operating infrastructure to scale AI across marketing. This movement separates the leaders from the laggards. Organizations that are pulling ahead no longer ask, "Which tool should we buy?" but "What operating system will enable my AI tools, agents, and workflows to function together most effectively?" Leading CMOs are pulling ahead in three areas:

- Investing in new capabilities to compete at each stage of the customer journey that large language models (LLMs) are disrupting, from discoverability to purchase
- Rewiring the organization for AI, including roles, talent, and organizational design, and evolving the ecosystem of tech partners and agencies
- Setting up a modern agentic tech stack powered by a deep understanding of the brand and how its best marketers work

In recent BCG client engagements with leading CMOs, we have seen cost efficiency improvements of 20% to 30% and, more importantly, major gains in growth and speed: a threefold increase in marketing ROI and a tenfold improvement in campaign cycle times.

This triple benefit is important. Although 40% of CMOs said that their organization primarily holds them accountable for cost savings and efficiency, the other 60%—especially those farthest along in the journey—report that they are balancing driving top-line growth with delivering visible improvements in execution speed and automation, while self-funding investments with productivity improvements. This shift toward a balanced focus is producing substantive results: 31% of business-to-consumer (B2C) CMOs and 20% of business-to-business (B2B) CMOs report that their agentic marketing transformation is already having significant, measurable revenue impact.

From Discoverability to Agentic Commerce: Reshaping the Customer Journey

GenAI and agentic marketing are changing the game throughout the customer journey, and CMOs are building new capabilities to enhance their competitiveness.

In our survey, 90% of CMOs agreed that GenAI is already reshaping how consumers discover and evaluate brands. In our discussions with CMOs, discoverability emerged as today's AI battleground. As a travel industry CMO in Asia-Pacific put it: "This is as big as the disruptions caused by search and e-commerce, and we are determined not to repeat the mistakes made in that era." The area where we see the biggest differences in regional priorities is agentic commerce, with 28% of Asia-Pacific CMOs placing it among their top three priorities, versus 23% of North American CMOs and just 13% of European CMOs.

In an AI-mediated discovery environment, brands no longer fully own their visibility. Increasingly, consumers arrive at decisions through AI assistants, agents, and recommendation engines that interpret, summarize, and rank brands on their behalf. If AI engines don't surface a product or service, it is at risk of becoming invisible, regardless of how strong the brand or media spending may be. Agentic engine optimization (AEO) is rapidly becoming as important a discipline as search engine and paid media optimization, and a majority of CMOs report setting up dedicated AEO and generative engine optimization (GEO) teams.

The personalization arms race is accelerating, too, and the best path to remaining relevant is to deploy a smart agentic layer. Leaders use AI agents to curate choices, consistently producing the most personally useful answers and brand connections in the moments that matter. (See "[The Promise Gap in Next-Best Action Programs](#).")

But forward-looking CMOs—especially in B2C sectors such as retail, fashion, travel, insurance, and auto—are also preparing for the next battle, as agentic commerce becomes a reality and LLMs disrupt the purchase decision itself. In fact, 91% of B2C CMOs (and 76% of B2B CMOs) say that AI-moderated, no-click discovery is currently reshaping their already nonlinear funnels. CMOs are figuring out when to meet customers inside LLM-driven experiences and when to invest in owning the customer relationship directly by building and embedding customer-facing agents in their own digital and physical channels.

Bridging the Talent Gap

AI is reshaping few other functions as quickly as it is marketing. But CMOs understand that this is a “human plus tech” transformation. They must reimagine the job to be done at every layer of the function—insights, strategy, creative, planning, production, activation, or measurement—in the context of what AI makes possible. Yet most organizations remain largely focused on targeted cuts rather than a fundamental reshaping of the function.

In contrast, leading CMOs say that they are pursuing more radical changes in three areas.

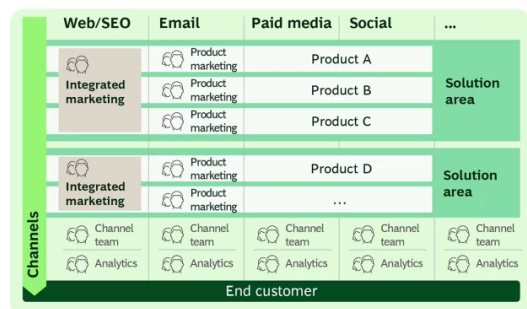
First, they are designing critical new roles and teams for the AI era. Besides establishing AEO/GEO teams, they are investing heavily in AI product owners who can design and manage the tools necessary for agent-assisted workflows. They are partnering with technology and analytics teams to designate AI governance owners responsible for designing guardrails and implementing responsible AI practices, while also enabling rapid adoption of cutting-edge technologies. And they are expanding marketing science and AI engineering teams.

Second, the 20% of CMOs at the forefront of the transformation have redesigned their organizational structures and are systematically rewiring their processes. They operate with smaller, AI-enabled teams that have broader remits, organized around business objectives or customer segments rather than channels. Because agents make cross-channel orchestration easier, they enable a redesign of previously siloed organizational structures. (See Exhibit 1.) Furthermore, CMOs are rethinking which tasks to centralize and localize.

EXHIBIT 1

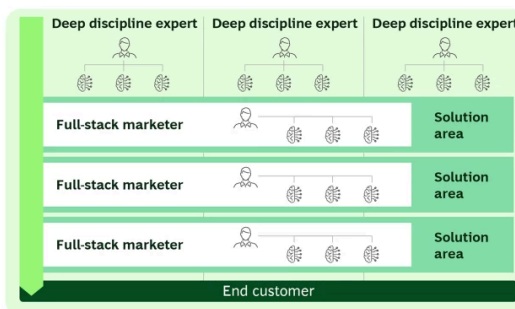
The Evolving Marketing Organization

What’s typical today: Channel and domain



Human-based teams with overlapping ownership
Multiple layers **separating product owner from end customer**
Significant **coordination overhead**, slowing execution

In the near future: Fully agentic



Focused teams with broader ownership assisted by agents
Product owners **closer to end customer**
Reduced coordination overhead, **streamlined execution**



Source: BCG analysis.
Note: SEO = search engine optimization.

Third, and most importantly, our CMO survey points to upskilling as the critical enabler of the modern agentic marketing organization. (See Exhibit 2.) About 80% of CMOs said that they are making significant investments in AI-specific upskilling programs across all levels of their organization, and a similar percentage are adding responsible AI and ethics training (up 10 percentage points from the 2025 numbers). Three CMOs across pharmaceuticals, media, and

fashion told us, “The talent doesn’t exist. I have to create it.” One B2B CMO recently upskilled her 3,000-person global marketing team, deploying in-person training, running hackathons to provide hands-on experience with new tools, and launching an AI academy to sustain the learning process.

EXHIBIT 2

Talent and Upskilling

Which of the following activities have you undertaken to ensure you have the right talent and skills to maximize the value from GenAI? (%)



Leading CMOs develop AI champions who co-create early solutions, drive scaling, and spearhead adoption; and they institutionalize cross-functional super-user groups to accelerate learning and cross-pollinate expertise across teams. They enable these super-users with early access to the latest technology and tools via partnerships with hyperscalers. They also disseminate the resulting knowledge to their broader teams in bite-size modules. For example, one leading tech CMO sends her team a Monday morning email message containing a five-minute video introducing a new tool to try out, thereby promoting continuous learning habits and building new skills in just 15 minutes each week.

In an AI world where companies can’t externally hire the AI talent they need at sufficient scale, systematic and radical upskilling is a critical part of the equation. As one CPG CMO put it, “Using these tools requires a new mindset. Early on, it takes more work to set up and train agentic tools to provide truly valuable answers. But as our super-users embed our collective learnings, brand standards, and ways of running campaigns into the tools, the results become extraordinary.”

The operating model for an AI-native marketing function will look meaningfully different from today’s. It will have new roles within nimbler, less-siloed core teams, more cross-channel orchestration, redrawn lines with agency and tech partners, a governance layer that did not exist three years ago, and a focus on continuous upskilling and change management.

Although the destination is clear, most CMOs admit that they still have a long way to go on this organizational transformation because the systems, the tools, and the talent are not there yet.

(See Exhibit 3.) Most CMOs see a future in which agile tools enable a smaller core team, but in the meantime 75% of CMOs are still working on rolling out and embedding agile pods to solve human bottlenecks and encourage cross-functional coordination in processes that lack agentic automation.

EXHIBIT 3

Processes and Ways of Working

With regard to processes and ways of working, do you think the development of GenAI and its applications in marketing will help to... (% selecting “strongly agree”)



Risks Are Real but Aren't Stopping Adoption

CMOs are aware of the risks that GenAI tools pose, but the nature of their conversation about those risks has evolved since 2025. They now view earlier concerns about potential loss of creativity or authenticity, for example, as being manageable if they deploy tools and train teams properly. Their focus has shifted to solving data security, privacy, legal, and implementation challenges, while introducing GenAI guardrails to protect the brand.

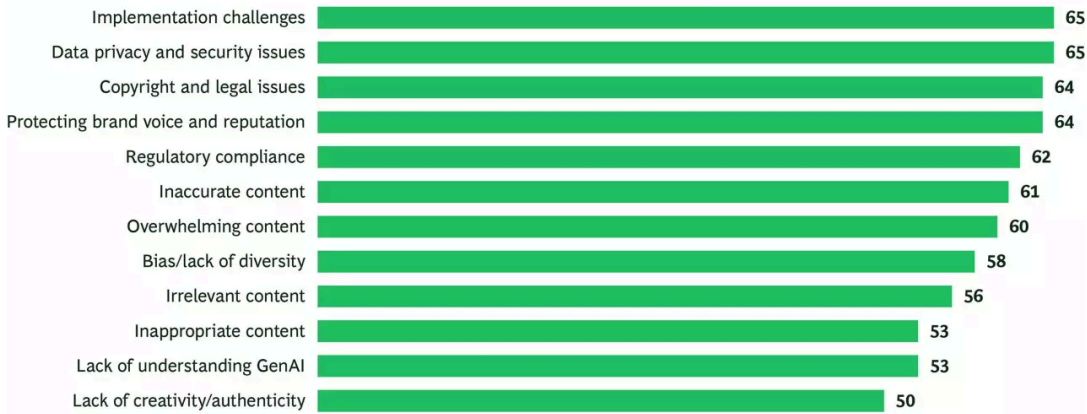
As the opportunities to create more content faster proliferate, CMOs recognize the importance of deploying the right governance and technology to maintain consistent brand identity and messaging. This doesn't mean that the work is easy or that there are few risks to manage, but leaders better understand the challenges that they must solve. (See Exhibit 4.)

As one tech CMO told us, “I am much more confident today than I was a year ago. I know what I need to scale. The hard work is ensuring enterprise alignment and upgrading our systems, security, and protocols.”

EXHIBIT 4

The Salient Risks: Execution, Security, Legal, and Brand

There is a severe risk using GenAI tools in marketing at my company due to...
(% selecting "agree" or "strongly agree")



Source: BCG CMO Survey 2026, n = 283.

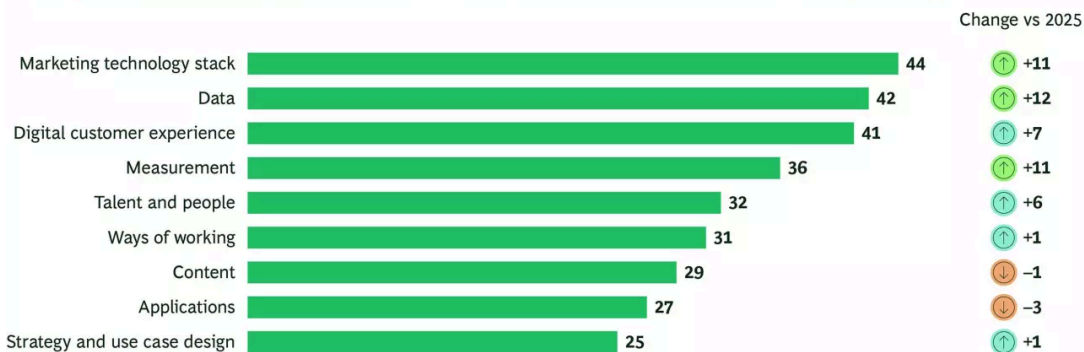
Doing the Hard Work on the Agentic Tech Stack

This year's CMO survey clearly indicates that the number one investment area is now martech and data, up 11 to 12 points since 2025. (See Exhibit 5.)

EXHIBIT 5

Investments

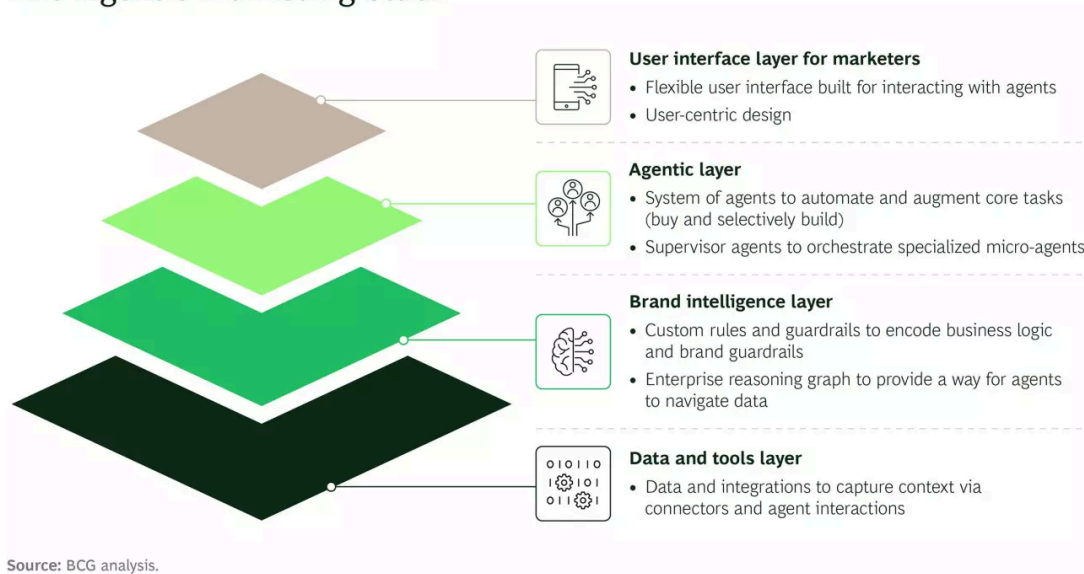
Thinking about your company's investment in AI and GenAI, which of these areas will be a top priority? (%)



Source: BCG CMO Survey 2026, n = 283.

CMOs need to work with a tech stack built from the ground up for agentic execution. Four layers define this new agentic stack (see Exhibit 6):

The Agentic Marketing Stack



- **Data**, including experiment-driven data, remains a key differentiator, a competitive advantage, and the basis of any modern marketing stack. Data governance and stewardship are essential, and bringing together data from different systems without costly data migration efforts is now easier than ever.
- A **brand intelligence layer** encodes the brand's rules and operating context and is essential to help probabilistic agents interpret data effectively. Coupled with an organization-specific brand overlay, this layer informs the company's messaging guardrails, defines the KPIs and connections across internal and external signals, and determines the trusted sources that agents should prioritize. It functions as the operating blueprint that a data-driven marketing team uses to think, act, and make sense of its data. Copilots become company-specific agents only when they are grounded in this structured understanding of the business. Increasingly, this foundational infrastructure distinguishes scaled AI organizations from companies that still operate in isolated pilots.
- **The agentic layer** is where leading CMOs move from point tools such as content localization agents to multiagent orchestration across end-to-end workflows. The unit of value is no longer an individual generative tool but a swarm of AI agents that can plan, execute, measure, and replan a campaign or customer journey across channels.
- A **unified user interface for marketers** is a single pane of glass that some leading companies have put on top of their tech stack to enable change management in a world where the best agents are constantly evolving and the underlying martech tools may also change. Although the future is uncertain, most leaders acknowledge that leading solutions must provide an ecosystem of open, composable tools, platforms, and agents, all thoughtfully designed for a single system to drive the business's success. This allows tech teams to constantly modernize the stack while maintaining a relatively consistent experience for the marketing teams.

What the Next 12 Months Will Ask of CMOs

Marketing has earned its place in the vanguard of the AI transformation. Pilots have proved the concept, roughly a quarter of organizations have documented the revenue impact, and the function is leading from inside rather than waiting to be led.

The work that remains is less visible than the pilots that got us here. It is structural—operating model, talent base, data foundations, brand intelligence layer, and orchestration architecture—and most of it does not produce a launch announcement. CMOs who finish that build will reset the bar for what marketing can do. Those who do not will find, within a budget cycle or two, that the mandate they currently hold has quietly moved elsewhere.

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