

From Campaigns to Business Value: How AI Will Transform Marketing

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There is little disagreement that AI will reshape marketing, but thinking too narrowly about the technology can limit its value. Marketing leaders who focus on isolated tools or pure efficiency gains are missing the bigger picture. The real opportunity lies in AI's ability to help CMOs reinvent their entire operating model in marketing to generate more profitable growth and enterprise value.

AI offers unprecedented opportunities to overcome organizational barriers and friction across technology platforms, by accelerating data flows and decision making. With this capability, leaders can move beyond sequential campaign processes and brand stewardship. Instead, they can accelerate cycles by balancing human judgment with AI to drive measurable value across the business, building organizational intelligence over time. The challenge is to connect internal and external ecosystems while sequencing and navigating the significant changes in how marketing work is done.

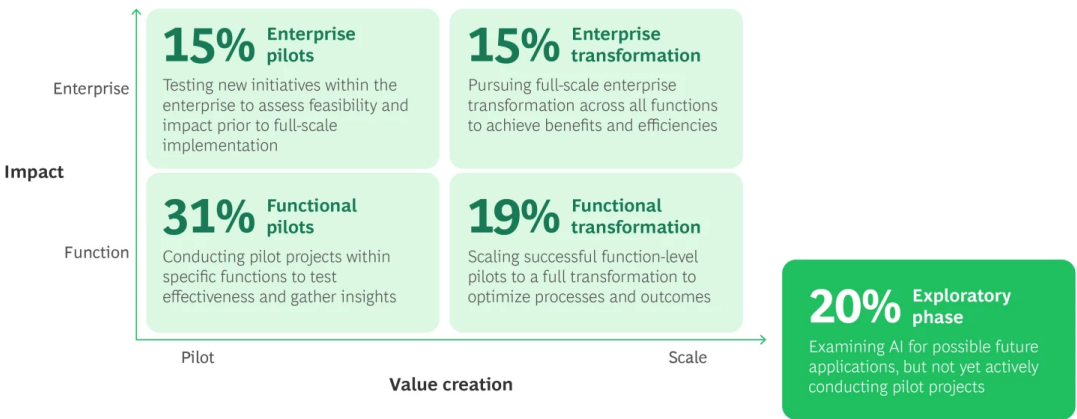
To understand AI's impact on marketing, BCG and the Global Marketing and Media Alliance surveyed around 60 of the world’s most senior marketing executives across sectors. Their objectives were to gauge the pace of AI disruption, identify the tasks that can generate the biggest impact and should be scaled first, and clarify how accountability in marketing work is likely to change.

The C-Suite Disconnect

Organizations struggle to mobilize around AI's future promise at a time when results remain limited. In our survey, leaders reported that only 15% of AI initiatives at their companies operate cross-functionally at scale to deliver value at the enterprise level. (See Exhibit 1.) Most initiatives are deployed within individual functions such as supply chain or marketing, or they focus on smaller efforts such as pilots and learning initiatives.

EXHIBIT 1

Companies Are Not Yet Scaling AI Effectively for Enterprise Value

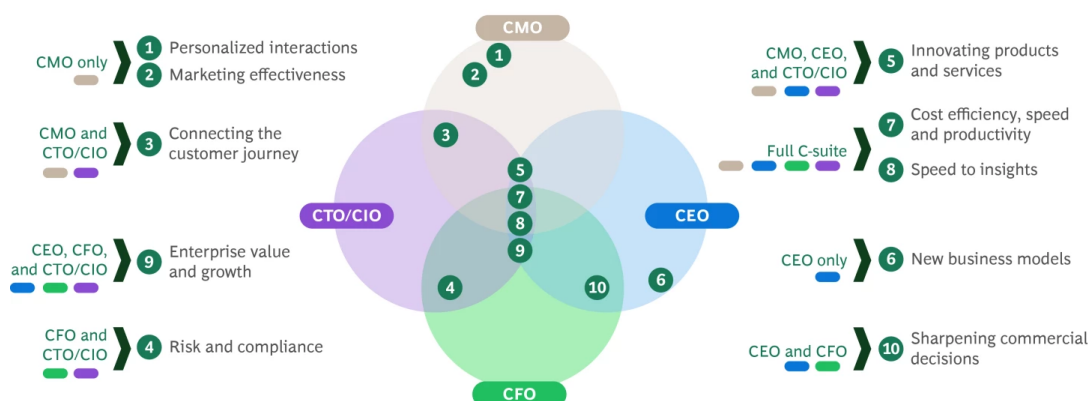


Source: MMA-BCG AI Disruption on the Marketing Operating Model Survey, 2025 (N = 58).
Note: Question: "As an organization, what is your distribution of the following types of AI efforts?"

The lack of C-suite alignment on AI helps explain why companies have been slow to scale AI across functions. Beyond a shared belief that AI can drive cost efficiency, speed, and productivity, executives generally disagree about the future value that AI can create across the enterprise. (See Exhibit 2.)

EXHIBIT 2

C-Suite Executives Differ on the Value That AI Will Create Across the Enterprise



Source: MMA-BCG AI Disruption on the Marketing Operating Model Survey, 2025 (N = 58).

Note: Question: "What do you think is the most important value AI will bring to your company in the next 2-3 years?" Only values cited by over 25% of at least one category of C-suite executives in the survey are shown.

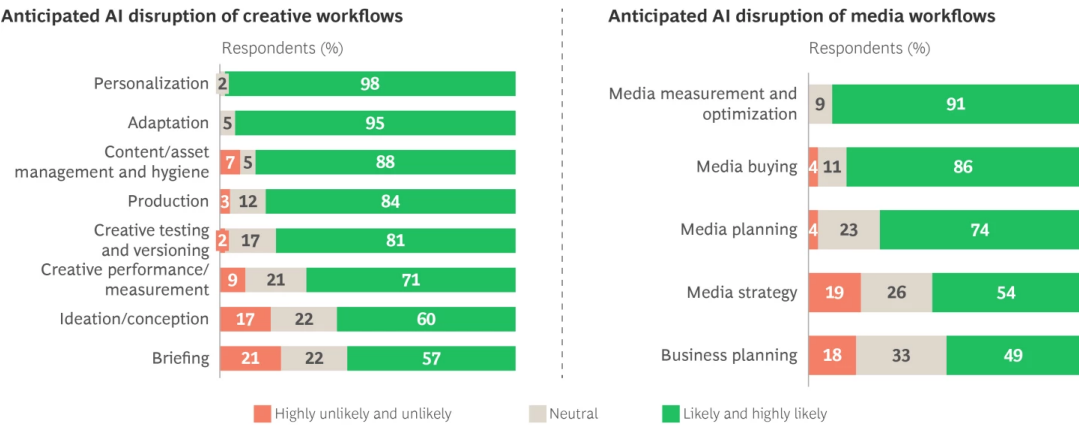
Marketers appear particularly isolated in the C-suite. CMOs expect that marketing effectiveness (57%) and personalization (45%) will be among the top ways that AI will create value in the future. The rest of the C-suite articulates AI's value in far more strategic terms: CEOs, CFOs, and CTO/CIOs all prioritize enterprise value and growth as AI's top prospective contributions. CMOs can find common ground with more of the C-suite on AI's role in product and service innovation. Until leaders align on language and outcomes, however, the C-suite will struggle to scale AI across the organization.

Shifting from Marketing Use Cases to End-to-End Workflows

Although the long-term prize is company-wide change, CMOs should focus on redesigning end-to-end workflows where AI disruption is likely to be greatest and most rapid. (See Exhibit 3.) AI initiatives scale quickest when the organization transforms workflows that can and should be easy with AI.

EXHIBIT 3

AI Is Least Disruptive to Workflows Requiring Human Judgment Across Creative and Media



Source: MMA-BCG AI Disruption on the Marketing Operating Model Survey, 2025 (N = 58).
Note: Questions: “What percentage of your creative/content workflows will be conducted by AI in 2–3 years?” and “What percentage of your media workflows will be conducted by AI in 2–3 years?” Because of rounding, not all percentage totals add up to 100%.

In creative workflows, AI will most readily accelerate personalization, adaptation (such as translation or localization), creative testing and versioning, content management, and some production tasks. AI excels in precisely these areas—tasks that build on existing creative ideas and require less human judgment. Our survey of CMOs revealed that early wins come first in search, social, and programmatic content, where creative workflows can make great use of data and algorithms to build on human inspiration.

Media workflows track a largely similar pattern. Measurement, planning, and buying benefit from upstream human judgment in processes like strategy and business planning. These areas are well suited to AI-enabled acceleration within two to three years. Content touchpoints and placements also favor performance marketing in media workflows. Programmatic, search, social, online video, and e-commerce (such as product detail pages) dominate the early adopter list.

Across end-to-end workflows in creative and media, these opportunities represent the most significant opportunities for CMOs and agencies to embrace AI adoption.

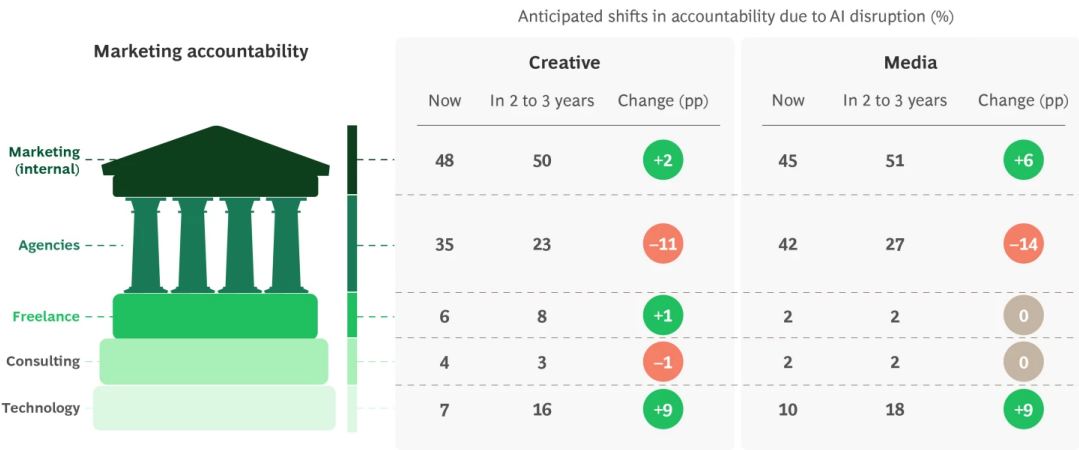
The Rapid Acceleration of Technology and Agentic AI

As AI advances, the decision-making focus shifts from the false dichotomy of “in-house or agency” to nuanced design governing who does the work and when. Our survey results suggest that more jobs will move from people to technology regardless of whether the focus is creative or media. This shift requires a new, holistic operating model that extends across internal teams and processes as well as external agencies and media partners.

In creative and media work, leaders expect agencies' contributions to fall by 11 to 14 percentage points over the next few years. Technology will pick up most of the burden. (See Exhibit 4.)

EXHIBIT 4

AI Will Shift Accountability Away from Agencies and Toward Technology in the Near Term



Source: MMA-BCG AI Disruption on the Marketing Operating Model Survey, 2025 (N = 58).
Note: Questions: “What is the mix of accountability for the work of creative/content OR media in marketing at your company today?” and “As AI accelerates, how will the mix of accountability change for the work of creative/content OR media in marketing at your company in 2–3 years?” Because of rounding, not all percentages add up to 100%, and the actual percentage point changes given may not match the differences in reported percentages. pp = percentage points.

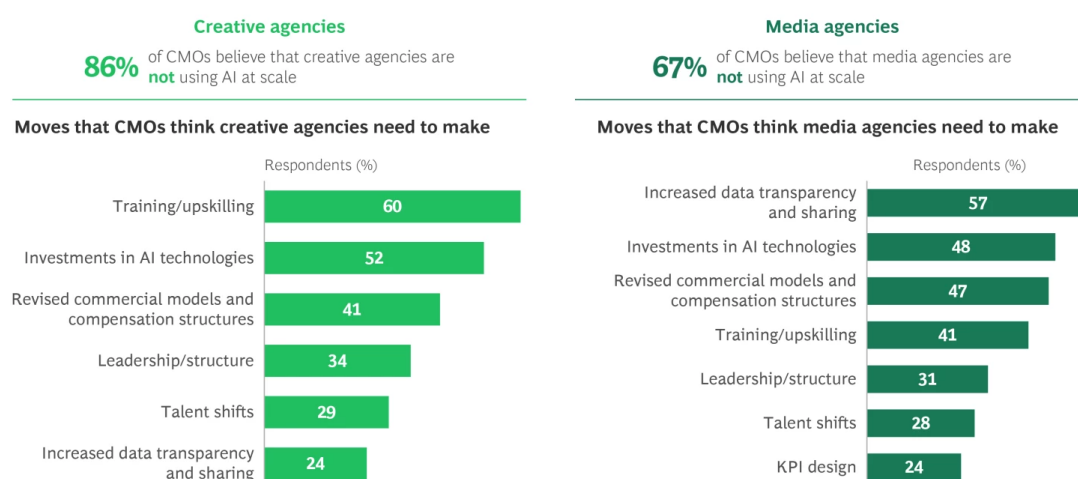
Marketing leaders also expect to see an acceleration of agentic AI. This form of AI, which can drive complex processes and make decisions autonomously, will grow to handle more than one-fifth of marketing’s total workload within two to three years, based on our survey. These imminent scenarios call for a fundamental rethinking of talent strategies and a thorough redesign of the processes that support marketing. Agentic AI will connect teams within marketing organizations and link them to agencies, media partners, and other technologies that deploy agentic AI. This shift will require foundational changes by CMOs to their current operating model for marketing.

A New Mandate for Agency Partnerships

Our survey also found that disruption gives CMOs a chance to redefine their agency relationships by leaning into the top AI enablers highlighted in the results. (See Exhibit 5.)

EXHIBIT 5

CMOs Are Skeptical That Agencies Are Ready to Scale AI



Source: MMA-BCG AI Disruption on the Marketing Operating Model Survey, 2025 (N = 58).

Note: Questions: "Do you think your creative/media agencies are using AI at scale today?" and "What will enable your creative/media agencies to successfully adopt and deploy AI to work as a better partner with you?"

Today, CMOs remain skeptical of agencies' ability to scale AI effectively. Their concerns center on the ability to align incentives, share value from AI-enabled efficiency, and challenge outdated business models. CMOs have an opportunity to use their buying power to redefine those relationships as true partnerships. That means aligning on desired business outcomes and the right partnership operating model to support those goals. Whatever the new balance might be between internal and external teams, handoffs to agencies must be tightly wired and transparent so that signals and value are not lost.

The Path Forward

Marketing leaders can take several clear actions to stay ahead:

- **Align the C-suite.** The C-suite disconnect on language and vision with regard to AI inhibits enterprise growth. Overcoming those barriers is essential to unlocking company-wide investment and setting the tone for marketing to help lead cross-functional transformation at scale.
- **Focus on meaningful marketing wins.** CMOs should start with initiatives where AI will most meaningfully reshape the business. In marketing, that means focusing on priority end-to-end workflows in creative and media and building a foundation for even broader cross-functional connectivity. By showing how AI supports enterprise value and growth, CMOs can make the case for a far broader company transformation.
- **Rethink agency partnerships.** Despite the disruption, agencies will remain a critical element in the future landscape. However, current agency partnerships—including commercial models

not designed to incorporate the productivity and efficiency benefits of AI— are not fully sustainable. As marketers open a dialogue with agencies, they can work together to develop a new partnership operating model with the right commercial structures and with remuneration aligned to outcomes and value creation. The future requires a true two-way partnership, not a transactional relationship.

- **Reimagine talent.** The rise of agentic AI will create a new connection between humans and AI within marketing workflows. As AI takes on more linear elements of the marketing equation, human talent can shift upstream to higher-value work such as strategy, partnerships, business planning, and true creativity. The future of marketing is not a choice between humans and machines, but rather a new human-led and AI-empowered operating model. Leaders who redesign the operating model holistically will be the true winners.

Because the next wave of AI in marketing will be more systemic than incremental, the next phase of transformation will require bold leadership and a willingness to reinvent how work gets done. CMOs must embrace with deep conviction the disruption that AI creates, and they must push toward a different future state of marketing—one that will drive even more growth and impact.

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