

# Shifting perspectives

From anticipating what's coming to embracing what's here

**Insights for Agencies from CMOs and Marketing Leaders: 2024–2025**


**CLEAR**

**Google**

As issues such as the role of artificial intelligence and privacy have reshaped marketers' agendas, agencies must calibrate their own approaches and skills to meet clients' demands

Clear M&C Saatchi

Google CMO & Senior Marketing  
Leader Insights: 2024–2025



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# Contents

- **Introduction**  
2024–2025 - Placing Bets & Making Moves
- **Chapter 1**  
Pressure Points: New Priorities, Powers and Problems
- **Chapter 2**  
AI Emerges: From Potential to Impact
- **Chapter 3**  
Privacy and Data: Navigating the New Normal
- **Chapter 4**  
The Evolving Agency-Client Relationship
- **Conclusion**



# Introduction

## 2024–2025 - Placing Bets & Making Moves

### **New Changes, New Expectations**

Advertising, as an industry and as a practice, has always been driven by change. From the days of fixed, linear media, through the rise of search and social media and the advent of third-party cookies, the way advertisers connect with customers has changed significantly. However, artificial intelligence has forced another new reckoning.

The rapid and pervasive adoption of AI has rendered 2024 a true demarcation point – producing a massive cultural and social shift in the business of marketing. The ripples emanating from it are forcing marketers to deal and keep up with more and more. Which means a set of new priorities – some subtle, some more pronounced – in what they expect from themselves, their teams and their agency partners.

*To better understand the impact of this change and what it means for agencies and their role in a changing marketing landscape, Clear M&C Saatchi conducted a global survey with over 700 senior marketing leaders on behalf of Google.*

The findings are clear: AI isn't about replacing people (or agencies); it's about supercharging human intelligence, talent, and creativity to deliver more. But new capabilities are creating new challenges and forcing hard choices.

Marketing leaders are caught in a bind. They know they need to demonstrate facility in wielding AI and other new technologies. But they are also more pressured to ensure those new tools deliver a clear return on investment. We're no longer in a 'wait and see' moment - the time to act, and deliver, is now.

We're now in an era of "embracing what's here."

And, while new capabilities extend marketers' access to data, greater pressure is pressing downward in the form of more intense scrutiny over user privacy. That is the environment marketing leaders find themselves in: more power coupled with more accountability.

2024 is where the lines between potential change and actual change can clearly be marked. While previous years may have been about "what's coming", we're now in an era of "embracing what's here."

### Key findings: what we heard from marketing leaders

- AI isn't just enhancing marketing practices, it's rewriting the playbook, promising new ways to drive efficiency, creativity and opportunity at scale – creating an expectation of agencies to do even more to create business growth
- Dynamic creative engines are already seen as a key to marketing success – noted by our respondents as the most impactful technology trend in the market and, increasingly, a requirement for impactful marketing
- Data and customer privacy is an ongoing challenge and priority, meaning many marketing leaders are looking to agencies to bring them new solutions as the landscape continues to evolve
- Diversity, equity and inclusion is an important factor to senior marketing leaders, not just in their teams and departments - many expect agencies to go above and beyond their own internal DEI commitments

The bottom line? Agencies have a critical - and strategic - role to play in helping senior marketers manage these complexities, navigate change and drive growth.

**Marketers are looking to agencies to work with them to solve their biggest priorities - especially implementing AI technology to drive more impactful marketing and adapting to changing regulations and technology in user privacy.**

This means a deeper need for agencies to demonstrate specialized expertise and talent, especially across emerging technologies and data analytics. Moreover, it's about demonstrating an ability to accelerate business growth. In this environment, agencies that position themselves as representing a "results-driven" partnership will reap the benefits.

## Methodology

From March to May 2024, Clear surveyed 757 global marketing leaders in 12 markets spanning EMEA, Americas and APAC regions and a variety of company sizes. This gives us a comprehensive wide-angle view of decision makers' priorities, hopes, concerns, and visions for the year ahead, providing insight for agencies to act on.

### Sample specifics:

Budget Authority: 41% of respondents manage annual marketing budgets ranging from \$10 million to \$50 million.

Company Size: 28% represent brands with over \$1 billion in yearly revenue.

# Pressure Points

New Priorities, Powers  
and Problems

# Pressure Points

## New Priorities, Powers and Problems

CMOs and marketing leaders have always expected successful agency partnerships to integrate sophisticated combinations of talent, technology and creativity to drive business impact and establish differentiation.

That hasn't changed. But at the margins, there are new considerations to factor in. Our research identified three key priorities expressed by marketing leaders as they look through the end of 2024 into 2025:

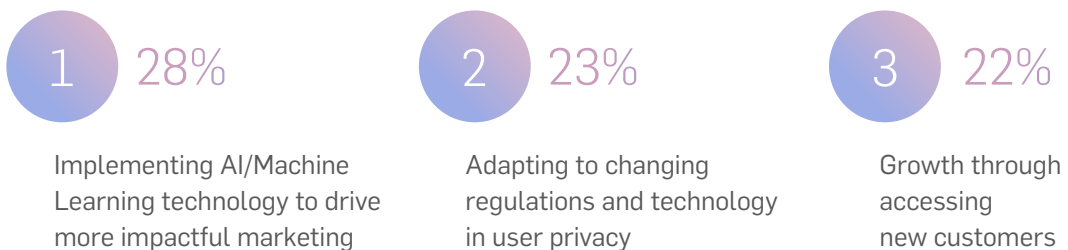
- **AI and Machine Learning Integration:** Implementing AI/Machine Learning to drive more impactful marketing comes in top, emphasizing the game-changing nature of the technology and the size of its impact on marketing.
- **Managing user privacy:** Adapting to changing regulations and technology in user privacy is second in the priority list for marketing leaders in 2024/5. This indicates the importance of turning privacy into a strategic advantage rather than a defensive measure.
- **Growth Matters:** Growth through accessing new customers is the third biggest priority. Going into 2025, as the economy continues to rattle investors and economic forecasters, CMOs and other marketing leaders will be under greater demands to drive measurable results.

### Adjacent Chart

Which of the following best reflects your top 3 marketing priorities for the next 12 months?

Base: Total (757)

### Top 3 marketing priorities for the next 12 months



### Making more of what's out there

When we asked marketing leaders about which trends and technologies they believe will have the biggest impact on their future marketing agenda, dynamic creative engines emerged at the top spot. As one marketing professional told us, "We need to upgrade to dynamic creative engines in order to compete... they're key to success". This technology is no longer a future prospect; it's a practical reality.

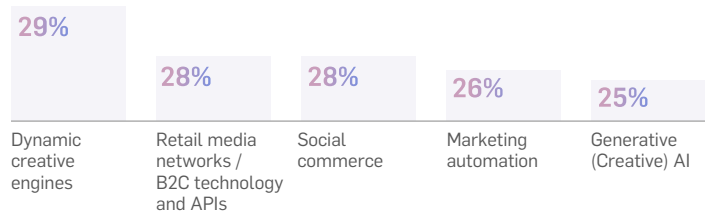
After dynamic creative engines we heard distinct opinions from our audience based on their role, with retail media networks and social commerce rising to the top at an overall level, but Web3 marketing seeming much more impactful to CMOs.

### Adjacent Chart

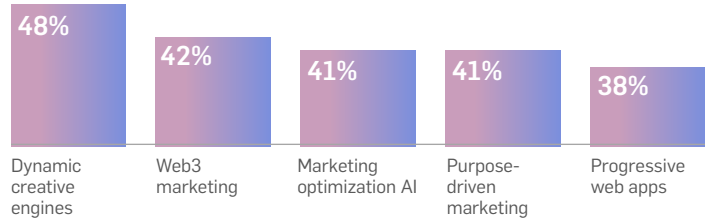
To what extent do you believe each of the following trends & technologies will impact your marketing agenda over the next 24 months?

Base: Total (757), CMOs (85)

### Top 5 most impactful emerging trends overall



### Top 5 most impactful emerging trends - CMOs only



In a sense, those two different north stars represent a similar set of impetuses. After AI, the growth of retail media networks has been one of the biggest changes to hit digital advertising. And while the term “metaverse” has disappeared from most marketers’ conversations, the idea of engaging consumers in immersive environments has expanded, particularly as brands work to reach new generations of consumers.

So where is the common ground between retail media networks and Web3? It comes down to the greater prominence and value associated with first-party data. As we noted, privacy is a matter that marketers have accepted as a priority to maintain vigilance of, particularly as part of their relationships with platform partners.

The opening of retail media networks and immersive Web3 experiences through entertainment, gaming and social media channels promises to provide brands with the connection, attention, and measurable outcomes and insights that surpass the online experience we’ve known for the last two decades. That’s the hope among our respondents, at least.

“Web3 marketing operates on decentralized networks, reducing reliance on centralized platforms,” a survey participant stated. “This acceleration is not just changing the marketing ecosystem; it’s redefining business across the board.”

## Harnessing the turbulence

In 2024, marketing leaders didn’t just move past the turbulence; they harnessed it to power future innovation and growth. But that doesn’t mean all their problems are solved. There are many issues keeping senior marketers up at night.

First and foremost — and perhaps unsurprisingly — marketers are thinking about how to unlock new marketing channels. And they want to know precisely where to invest across an ever-more bewildering and complex communications landscape.

### Other key concerns for marketing leaders include:

- Building a marketing team with the right skillset
- Creating and managing a valuable data infrastructure
- Keeping pace with (and staying ahead of) consumer change
- Speeding up go-to-market strategies for new products and services



### Adjacent Chart

To what extent would you agree that each of the following are 'keeping you up at night' in your role?

Base: Total (757)

Similarly important across all geographies

\*Top 10 ranking of concerns globally

	GLOBAL*	AMER	EMEA	APAC
Knowing how to unlock new marketing channels	1	2	2	1
Understanding where to invest across an increasingly complex media landscape	2	4	6	4
Building a marketing team with the right skillset	3	5	1	17
Creating and managing a valuable data infrastructure	4	7	3	8
Staying ahead of the increasingly fast pace of consumer change	5	2	12	6
Speeding up time to market for new products and services	6	1	9	19
Proving ROI and the value of marketing spend	7	7	14	5
Finding new sources of growth (audiences, geographies, adjacencies)	7	11	6	7
Managing economic pressures and reduced budgets	9	14	14	2
Knowing how to leverage AI technologies to commercial advantage	10	14	5	11
Knowing where to place big strategic bets for the future	10	6	12	13

## What does it mean for agencies?

Changing technologies and regulations — especially around AI — are creating new challenges and opportunities for marketing leaders, but also for agencies who are able to harness the change to drive growth. CMOs and other marketing leaders need their agency partners to help them leverage the full power of new technologies and trends to drive commercial value. Staying on top of the changes is table stakes. But helping clients understand how to implement and adapt to them, turning challenge into advantage, is the opportunity for agencies to stand out.

# AI Emerges

From Potential  
to Impact

# AI Emerges From Potential to Impact

The transformation of AI in marketing from breathless hype to fundamental tool is essentially complete.

In essence, AI engines have helped marketing professionals develop new ideas and approaches to meeting their creative and analytics needs. Automation not only gives individuals and teams more time to strategize – it opens up additional pathways for thinking and creating.

Our survey data emphatically supports this. When we asked marketing leaders where they expect to see the greatest impact from AI, three specific areas emerged:

- 01 Digital Advertising and Media Planning:** AI is revolutionizing ad targeting and delivery. One respondent noted, AI will “provide better and newer ideas for our business to create a different approach and more visibility in the market.”
- 02 Digital Experience Marketing:** AI is enhancing web, mobile, social, and virtual events. Even search strategies and SEO positioning have been advanced. As one survey respondent observed, “It will improve the quality of work and also reduce the effort and money [required].”
- 03 Marketing Technology and Operations:** AI is overhauling operations entirely. As another respondent put it, “With AI, our business will be able to analyze vast amounts of data in real time and make more accurate predictions about customer behavior and market trends.”

## Integrating AI for business impact

Our research shows that AI is enabling senior marketers to personalize content at scale, predict customer behavior with unprecedented accuracy, optimize ad spend in real-time, and generate creative ideas and content more efficiently.

A quarter of all survey participants said generative AI represented the greatest difference in how ideas become reality.

**Three quarters of marketing leaders say that they will increase their investment in technology and infrastructure in an attempt to fully leverage the value of AI, and that AI will inspire more compelling and creative breakthrough ideas.**

As already mentioned, Dynamic Creative Engines emerged from our data as the technology/trend that marketing leaders perceive will have the most impact on their marketing agenda. Moreover, a quarter of all survey participants said generative AI represented the greatest difference in how ideas become reality.

The expectation? Investment in gen AI will allow marketing campaigns to scale more quickly, efficiently and effectively without a “proportional increase in effort or expense.”

These AI-powered systems generate and optimize ad creative in real-time based on user data and context, addressing two critical challenges: the need for personalization at scale and the demand for efficient, data-driven creative processes.

The impact on personalization and conversion rates is especially significant. “We need to upgrade to dynamic creative engines in order to compete with the modern trend of technology,” we were told. “Dynamic creative engines are key to success.”

That competitive advantage can't be overstated. Dynamic Creative Engines simply allow for the production of more personalized and optimized content. And that's expected to raise conversion rates.

When it comes to Marketing Technology and Operations, the integration of AI is creating new efficiencies. Our survey indicates that most marketing leaders believe AI will improve marketing efficiency as AI integration is brought to bear on Predictive Analytics, Chatbots and Virtual Assistants, Content Creation, and Programmatic Advertising.

## **Balancing artificial and human intelligence**

As for the challenges, it comes down to making sure personnel are up to the task of using AI to its fullest. It's a maxim of machine learning: quality outputs depend on quality inputs.

So a knowledgeable, experienced professional who can present AI engines with targeted and efficient prompts, or smarter questions will assemble the most actionable data; that's the bottom line when it comes to deriving more valuable results.

71% of marketing leaders tell us that AI will change the way they hire — namely bringing in more people who know how to get the most out of it

AI can't do it all by itself. Managing these systems will be as important as possessing impeccable creative acumen, customer orientation and an optimal media mix for both marketers and their agency partners.

### **What does it mean for agencies?**

CMOs and marketing leaders are looking to agencies to help them make the most of AI. While it's already become an essential tool in their toolbox, there is still room — and need — for experimentation and testing in leveraging AI to drive maximum commercial value.

This means agencies will require a highly-skilled workforce that can expertly implement and manage AI systems to enhance the various talents under their roofs. Any lingering tension between “art and science” must be let go and technology embraced to its fullest potential in enhancing creativity as well as efficiency within marketing.

# Privacy and Data

Navigating the  
New Normal

# Privacy and Data

## Navigating the New Normal

Privacy in marketing has become a central issue, not just a peripheral concern. As already noted, adapting to changing regulations and technology in user privacy is the number two priority for marketing leaders as they look through the end of 2024 into 2025.

The good news is that, while it's certainly a top of mind concern, the majority (53%) of our respondents claim to be aware of and understand most of the upcoming privacy changes in the market and the impact they could have on their business.

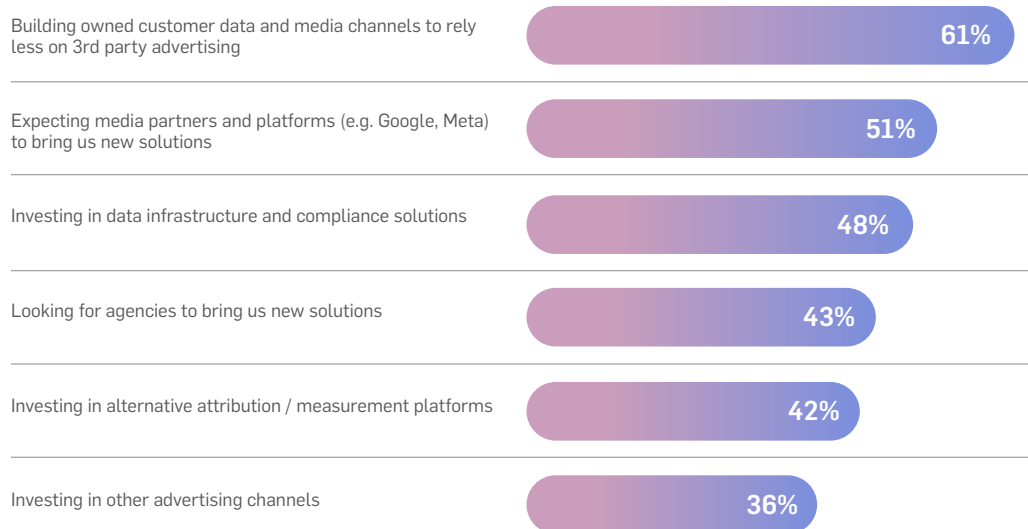
The up-shot? The opportunity for agencies lies in helping their clients prepare for and get ahead of these changes - turning them into competitive advantage as opposed to commercial liability.

### Activities planned to stay ahead of changes

#### Adjacent Chart

In what ways are you planning to stay ahead of / adjust to changes around data privacy in advertising?

Base: Those expecting to be impacted by privacy changes (166)



Most notably, marketers have told us that they're shifting away from reliance on third-party data. Among those who expect to be impacted by privacy changes, 61% are planning to build "owned customer data and media channels," actively reducing reliance on third-party advertising.

Marketers know that good data is the fuel for effective marketing. So, while third party cookies can still provide significant value in the advertising ecosystem, there is an appreciation that expanding sources of data enables efficient marketing campaigns that also meet user privacy requirements.

The real challenge for CMOs and marketing leaders lies in balancing first-party data with third-party analytics to provide a comprehensive view of the customer. To do so, they're looking to partners to make that happen.

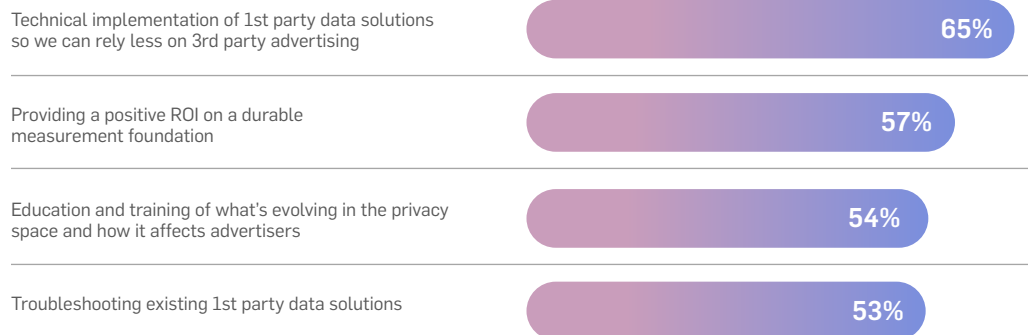
51% of senior marketers are looking to agencies to solve how they adapt to changing regulations and technology in user privacy.

### Help required from media partners/platforms to stay ahead of changes

#### Adjacent Chart

How can media partners and platforms help you stay ahead of these changes around data privacy in advertising?

Base: Those expecting partners & platforms to bring new solutions or deciding to build owned customer data (140)



### What does it mean for agencies?

When it comes to data privacy, marketing leaders are looking to agencies to help them proactively adapt to — and make the most of — changing technology and regulations. It's not just about educating them on what's happening. It's about bringing and implementing solutions that meet regulations while also enhancing their effectiveness and ROI.



# The Evolving Agency-Client Relationship



# The Evolving Agency-Client Relationship

Our survey data suggests that – despite all the change marketers are managing – the agency-client relationship is as critical as ever looking into 2025 and beyond. But it's also undergoing a significant transformation, driven by changing expectations and dynamics.

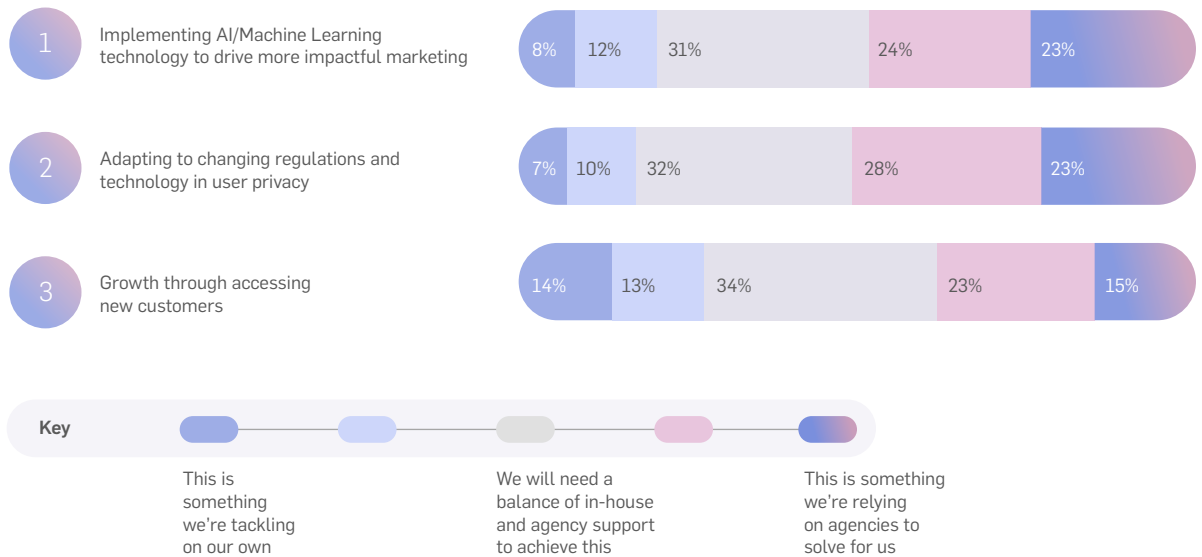
Particularly important to note is that our marketing leaders are largely expecting agencies to solve their most important priorities for them. This is true for both implementing AI for more impactful marketing and adapting to changing regulations and technology in user privacy.

## Agency support sought for the top 3 marketing priorities for the next 12 months

### Adjacent Chart

You mentioned that the below are your top 3 marketing priorities over the next 12 months. To what extent are you looking to your agencies to support you in each of these areas?

Base: Total (757)



## Demonstrating value

Despite marketing automation and AI having the potential (and being expected) to provide cost efficiency and savings, this is not the primary driver and benefit of the new technology for our respondents. Instead it's about the opportunity to drive growth – appreciable outcomes and provable competitive advantages. And that means that outside knowledge and specialist capabilities are in strong demand.

32% are planning on exploring new agency capabilities in the next year (vs 28% who are planning on bringing agency expertise in-house)

Advances in AI — and its promised potential — mean marketing leaders expect to spend more, but also to get more from their agencies.

Unsurprisingly, this means that selecting the right partner is critical to success. And our marketing leaders place a premium on proving success and impact while bringing unique advantages to the table.

When selecting a digital advertising agency partner, their foremost consideration is the agency's clear ability to drive business growth, showcasing their capacity to deliver tangible results. This is closely followed by the agency's depth of experience within the specific industry or category, ensuring they possess relevant insights and expertise.

Also, marketing leaders value agencies that leverage proprietary data and technology — the surest way to demonstrate a competitive edge.

### Digital agency partner selection criteria - top considerations

<b>01</b>	<b>02</b>	<b>03</b>	<b>04</b>	<b>05</b>
Track record of helping clients achieve business growth	Demonstrated category experience	Use of proprietary data and technology	Innovation capabilities of the agency	Level of service the agency staff provide

#### Adjacent Chart

To what extent do you consider each of the following factors when selecting a digital advertising agency partner?

Base: Total (757)



### Regional Nuances

While these priorities are constant, our data reveals some regional differences between the Americas, EMEA, and APAC regions.

In the Americas, there's a notable emphasis on tangible recognition and technological prowess, with award wins and the use of proprietary data and technology topping the list. That's followed by demonstrated category experience, relevant case studies, and existing business relationships.

Both EMEA and APAC leaders, on the other hand, emphasize a proven track record of driving business growth.

EMEA marketers value partnerships with key media owners and service providers. They also place high importance on relevant case studies, agency innovation capabilities, and a strong reputation for creative and strategic thinking.

Aside from sharing EMEA's primary focus on past growth, APAC uniquely prioritizes creative and strategic reputation as their second most important factor. APAC also values third-party and client referrals, highlighting the importance of word-of-mouth and reputation. Innovation capabilities and demonstrated category experience round out APAC's top five considerations, indicating a balanced approach to agency selection that combines proven results with forward-thinking strategies.

## Spend where it counts

While 'in-housing' of agency skill sets and capabilities has been a hot topic for a number of years now, our survey data suggests that, far from bringing everything in-house, marketing leaders are looking to agencies — perhaps more than ever — to provide valuable outside-in support and expertise that drives growth.

This translates to expected spend increases with agencies next year across multiple areas, including ecommerce, product marketing, and marketing analytics at the top of the list.

### Top 10 areas where more investment with agencies is planned

(slightly/significantly more likely to invest)

#### Adjacent Chart

You previously told us you currently work with agencies in these areas. Over the next 24 months, how (if at all) do you expect that to change?

Base: Total (757)



The number one driver for planning to increase spend with agencies? To bring in external expertise that challenges internal thinking.

## Diversity as a must-have

Our survey data also reveals that DEI remains an important factor to senior marketers across the globe. And this doesn't just extend to their departments and teams.

46% of marketing leaders expect agencies to go above and beyond their own internal DEI commitments.

It's clear that, looking to 2025 and beyond, marketing leaders will prioritize working with agencies that themselves prioritize diversity – in their staff, principles and ways of working.

Moreover, as already mentioned, the success of AI and machine learning models depends on the quality of information inputs – and that depends on who is creating the inputs. A diverse organization and agency team isn't a nice-to-have but a need-to-have for future marketing leadership.

### What does it mean for agencies?

As we move into 2025, marketing leaders are looking for agencies to bring them diverse expertise that can embrace the power of new technologies and challenge internal thinking to create a powerful competitive advantage. The agency-client relationship is more important than ever. But amid the backdrop of regulatory and technological change, it's also under more pressure than ever. Agencies that can demonstrate efficiency and effectiveness in driving business growth will come out on top.

# Conclusion

## Conclusion

# Key Takeaways for Agencies

2024 has already proven to be an indisputable “change year.” While previous years have been premised on anticipating technological evolution, 2024 has ushered in an era of rapid implementation and integration, especially in AI.

As we head into 2025 it's clear that AI is not just a passing trend but a permanent fixture. As our survey data shows, marketing leaders are bought into this reality and excited by the opportunities it provides in driving business growth.

### Marketing leaders expect AI to:

- Inspire more compelling breakthrough creative ideas
- Allow more personalize in connecting with their audience(s)
- Make their marketing campaigns more effective
- Impact who they look to hire and work with

### **But, importantly, they also expect their agency partners to adapt to this new reality of an ever-evolving regulatory and technological environment.**

The good news is that the agency-client relationship is both strong and more essential than ever. And we heard loud and clear in our survey data – marketing leaders are prepared to invest in agencies that can effectively harness intelligence in people and technology to help them achieve their marketing goals.

But this also means marketing leaders' expectations of agencies are growing. They are demanding more efficiency, more value and more innovative solutions from their agency partners. This is particularly in regards to how they leverage AI but also in how they adapt to changes around user privacy, diversity, equity and inclusion.

Looking further ahead, we can expect the pace of change to continue accelerating. The next wave of marketing evolution is likely to see even greater integration of AI across all aspects of marketing, from strategy to execution. We may see the rise of AI-human hybrid teams, where AI systems work alongside human marketers to drive unprecedented levels of efficiency and creativity.

Wherever we end up, we believe this is an exciting moment for both marketing and agency leaders. Change is a good thing. And the future belongs to marketers and agencies who can not only keep pace with change but harness it to drive greater connection, innovation and growth.

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