

The Next-Gen Marketing Platform Imperative

How CMOs And Agencies Must Evolve In The Age Of AI

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FORRESTER OPPORTUNITY SNAPSHOT: A CUSTOM STUDY COMMISSIONED BY STAR | OCTOBER 2025



From Fragmentation To Orchestration — What CMOs Expect From Their Agencies In An AI-Driven World

AI is rapidly transforming business, and marketing is at the forefront. As platforms become more intelligent, CMOs can expect them to connect data, orchestrate experiences, and drive growth. Yet many organizations remain hindered by fragmented marketing tools and systems and CMO-CTO misalignment, all of which limit the ability to scale AI's promise.

To understand how marketing leaders are navigating this moment, Forrester surveyed 310 marketing decision-makers at the director level or above with responsibility for digital transformation or AI within the marketing function at their organization. We sought to understand the perception of AI in marketing, along with the appetite, challenges, and the steps organizations are taking to better arm their marketing objectives.

Key Findings



Integration is the new growth driver. CMOs know AI won't scale without interoperable data and connected workflows — agencies that unify ecosystems unlock personalization and growth at speed.



Agencies risk irrelevance. Nearly half of CMOs saw agencies falling short on AI, and one in three viewed their platforms as interchangeable — differentiation is no longer optional.



The winning play is modular and ROI-driven. CMOs want partners who prove measurable impact, deliver reusable platform components, and close digital skill gaps to stay indispensable.

Growth And AI Are Now Nonnegotiable

CMOs are under unprecedented pressure to deliver growth, and AI has moved from experiment to necessity. In our survey, 76% cited revenue growth as a critical priority, while 53% rank adopting AI/ML capabilities at the top of their agenda.

For CMOs, AI is not hype — it is a practical lever to accelerate growth, fuel innovation, and transform customer experience. Agencies must recognize that these ambitions are not just technology-driven, but business-driven. To remain relevant, they must demonstrate how their platforms and services directly contribute to growth and AI-enabled performance. Agencies that cannot prove this connection risk being sidelined as CMOs invest in partners who deliver business impact at speed and scale.

Top Strategic Priorities Over The Next 12 Months

● Critical priority ● High priority

Grow revenues

76%

21%

Adopting AI/ML-driven capabilities

53%

42%

Improve the experience of our customers

52%

42%

Improve our ability to innovate

52%

41%

Improve the experience of our employees

44%

47%

Improve the differentiation of our offerings in the market

36%

59%

Increase operational resilience

35%

60%

Improving collaboration between IT and other lines of business

34%

63%

Note: Showing top eight responses

Base: 310 decision-makers at the director level or above with responsibility for digital transformation or AI at their organization

Source: Forrester's Q3 2025 Enterprise Platform Development Survey [E-64106]

CMOs Step Into Tech Leadership

CMOs are no longer on the sidelines in technology decisions. Our survey showed 56% now hold a formalized marketing technology (martech) leadership role, and 54% participate in joint strategic planning with CTOs.

This signals a fundamental shift: Marketing leaders are embedding themselves directly into platform, data, and AI adoption strategies to ensure technology choices serve brand growth and customer experience.

Agencies can no longer assume CMOs lack technical fluency. Instead, they must engage CMOs as informed technology stakeholders who are able to question platform choices, evaluate data strategies, and demand solutions aligned to marketing priorities. Those agencies that fail to adapt risk losing influence in a landscape where marketing increasingly sets the tech agenda.

How Marketing Leadership Influences Technology Decisions

56% Formalized role for marketing technology (martech) leadership



54% Joint strategic planning sessions



45% Direct collaboration with CTO/CIO



41% Technology steering committees involving marketing



33% Dedicated technology liaison within marketing



Misalignment With CTOs Limits Progress

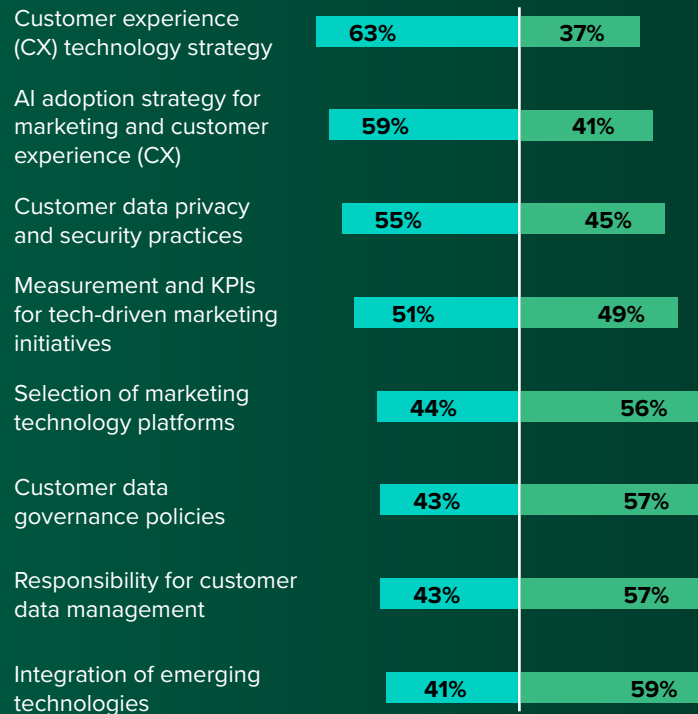
While CMOs and CTOs align on the importance of outcomes like customer experience (CX), alignment quickly unravels when it comes to execution and investment.

Our survey showed just 36% are fully aligned on tech investment priorities and 41% are aligned on budget allocation for marketing technologies. This misalignment leaves CMOs ambitious but underequipped, with strategy outpacing resourcing. Agencies have a critical role to play in bridging this divide, translating marketing goals into technical roadmaps and proving how platform investments accelerate growth.

Those that succeed will earn influence not only with CMOs but also with CTOs, positioning themselves as indispensable partners at the executive table.

Where CMOs And CTOs Align — And Where They Don't

- Fully aligned
- Partially aligned



Agencies Lack AI-Driven Automation

CMOs increasingly expect agencies to deliver advanced automation, analytics, and AI-powered insights but many feel let down. In our survey, 47% said agency platforms fall short on AI-driven automation and 37% cited insufficient analytics and performance tracking.

Trust is further strained by delivery gaps: Only 18% strongly agreed that agencies provide the tech they promise. This disconnect risks undermining agency credibility at a time when CMOs see AI as essential to growth and differentiation. Unless agencies close the gap on AI-enabled capabilities, they risk being viewed as execution vendors rather than innovation partners.

“Where does your current agency’s marketing technology fall short or where would you like to see improvement?”

47%

Lack of AI-driven automation and optimization

**38%**

Inadequate data privacy, security, or compliance

**37%**

Insufficient analytics and performance tracking capabilities

**31%**

Lack of visibility into agency technology capabilities or processes

**26%**

Cost or value delivered does not justify investment



Note: Showing top five responses

Base: 310 decision-makers at the director level or above with responsibility for digital transformation or AI at their organization

Source: Forrester's Q3 2025 Enterprise Platform Development Survey [E-64106]

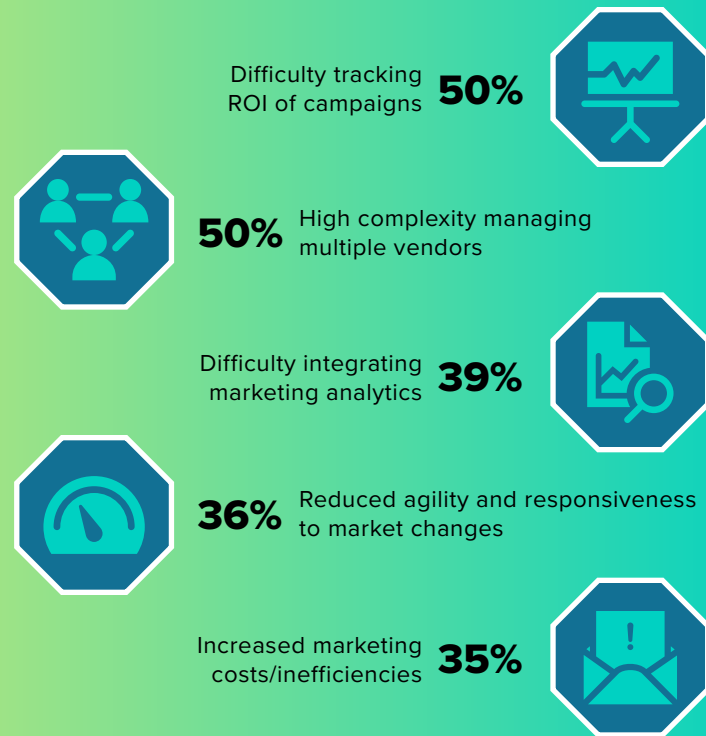
Fragmented Systems Undermine Integration

Fragmentation remains one of marketing's most persistent barriers. In our survey, 50% of CMOs said disconnected systems make it difficult to track ROI on campaigns, while many also struggled with complex vendor ecosystems, siloed data, and inconsistent processes.

For CMOs, this isn't just operational friction: The inability to demonstrate ROI undermines credibility with the C-suite and weakens future investment cases. Agencies risk being part of the problem when their platforms and tools add further complexity rather than simplify it.

The opportunity lies in helping clients unify data, streamline workflows, and connect insights to measurable outcomes.

“What challenges does your organization experience due to fragmented marketing systems and tools?”



Note: Showing top five responses
Base: 310 decision-makers at the director level or above with responsibility for digital transformation or AI at their organization
Source: Forrester's Q3 2025 Enterprise Platform Development Survey [E-64106]

Agency Tech Risks Commoditization

Agency technology is valued but not seen as unique. In our survey, 74% of CMOs said tech capabilities significantly influence agency selection and retention, yet 32% viewed agency platforms as interchangeable. Transparency is also lacking: Only 13% strongly agreed they fully understand the platforms their agencies use, and just 17% felt regularly educated by their agencies.

This combination of weak differentiation and discrepancies between customers' expectations, the service they actually receive, and limited visibility risks reducing agencies to commodities, with little preventing CMOs from switching providers. To remain indispensable, agencies must both innovate and demystify their platforms, proving unique value beyond execution.

Agency Partner's Technology Platforms

● Strongly agree ● Agree

Agency tech innovation is critical to our retention decisions

23%

62%

Agency tech reliability directly impacts our marketing performance

32%

49%

We actively assess and benchmark agency technology capabilities

16%

65%

Agency technology platforms significantly influence our selection decisions

19%

61%

Our agencies consistently deliver the tech capabilities they promise

18%

63%

Differentiated agency tech significantly impacts our partnership decisions

8%

68%

We fully understand the technology platforms our agencies use

13%

56%

Our agencies frequently educate us on new technology tools

17%

38%

Note: Showing eight responses

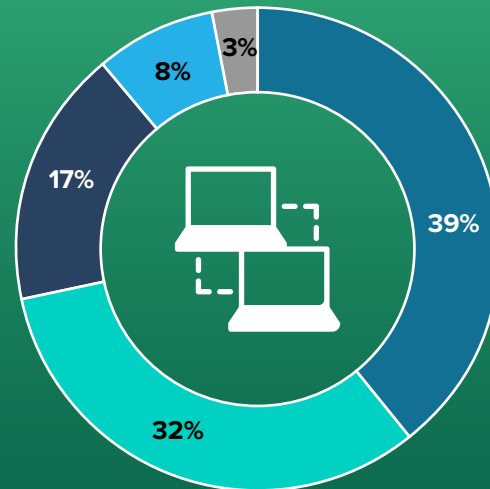
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Source: Forrester's Q3 2025 Enterprise Platform Development Survey [E-64106]

Unifying The Martech Ecosystem

Integration is the missing link CMOs want solved. Today, only 8% reported seamless data unification between brand and agency platforms, while 39% admitted significant gaps remain. This failure directly impacts personalization and slows down campaigns. Agencies are uniquely positioned to step into this gap by connecting disparate systems, data, and tools into a coherent, modular ecosystem that enables brands to move faster and scale smarter. By owning the integration challenge, agencies can reposition themselves as orchestrators of marketing ecosystems rather than tactical executors elevating their value to the CMO agenda.

“How effectively does your organization currently unify data across brand and agency platforms for personalized marketing?”



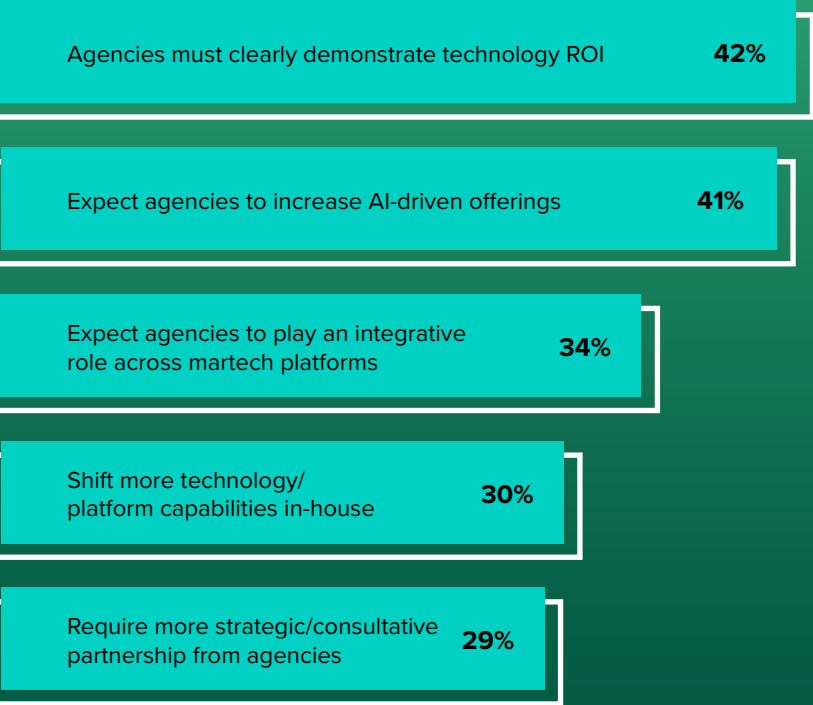
- Moderately effective, some gaps remain
- We are actively working to resolve integration gaps
- Minimally effective, significant integration issues
- Very effectively, seamless data integration
- We rely entirely on our agency to manage this

Proving Business ROI Through AI Is The New Baseline For Agency Credibility

Accountability is now nonnegotiable for agencies. Our survey showed 42% of CMOs said agencies must clearly demonstrate ROI from their technology platforms if they are to remain trusted partners. This marks a sharp shift away from judging agencies primarily on creative or execution.

Today, ROI is the currency of credibility and AI-enabled automation, analytics, and measurement are seen as the levers to deliver it. CMOs are making investment decisions based on business outcomes, not promises. Agencies that can connect their technology capabilities directly to measurable growth will stand apart. Those that cannot prove ROI risk being replaced by partners or in-house teams who can.

“How do you expect your relationship with agency partners to evolve in response to emerging trends (i.e., AI, CX demands)?”



Note: Showing top five responses
Base: 310 decision-makers at the director level or above with responsibility for digital transformation or AI at their organization
Source: Forrester's Q3 2025 Enterprise Platform Development Survey [E-64106]

Close Digital Skills Gap

CMOs know that technology alone will not deliver transformation. In our survey, 44% cited limited technical expertise in AI, cloud, or low-code tools as a major barrier to scaling digital initiatives. These gaps slow adoption and blunt the impact of even the best investments.

Agencies have an opportunity to fill this void not just by providing platforms but by embedding expertise, offering training, and empowering marketing teams to become more self-sufficient. By enabling CMOs to overcome their toughest internal skill gaps, vendors can secure long-term trust and position themselves as transformation partners rather than short-term execution vendors.

“Which of the following challenges limit your organization’s ability to effectively scale digital initiatives?”

46% Difficulty demonstrating clear ROI



44% Limited technical expertise (AI, cloud, low-code)



36% Difficulty aligning business and IT teams



35% Rapidly changing market demands



33% Insufficient collaboration tools/processes



Note: Showing top five responses

Base: 310 decision-makers at the director level or above with responsibility for digital transformation or AI at their organization

Source: Forrester's Q3 2025 Enterprise Platform Development Survey [E-64106]

Conclusion

This study highlights an inflection point for CMOs and agency partners. CMOs are under pressure to drive growth with AI now at the center of their strategic agenda. Yet misalignment with CTOs, fragmented martech ecosystems, and weak ROI visibility block progress. The gap between AI promise and performance is an integration problem — siloed data and disconnected workflows stop AI from scaling. Interoperability is a growth driver, and agencies that deliver modular, integrated platforms and prove ROI through AI can become indispensable partners of growth.

CMOs drive growth through AI but lack alignment and integration. Revenue growth and AI adoption top the agenda yet misalignment with CTOs and fragmented ecosystems hold them back.

Agencies risk commoditization unless they evolve. Nearly half of respondents said agencies fall short of AI automation, and one-third saw agency platforms as interchangeable, showing that agencies are valued but not differentiated.

Agencies that unify martech ecosystems, prove ROI through AI automation, and help close skill gaps can become indispensable growth partners.

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Methodology

This Opportunity Snapshot was commissioned by Star. To create this profile, Forrester Consulting supplemented this research with custom survey questions asked of 310 decision-makers at the director level or above with responsibility for digital transformation or AI at their organization. The survey focused on the role of AI in the future of marketing and AI adoption. The custom survey began in June 2025 and was completed in August 2025.

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Demographics

COUNTRY	
EMEA	66%
NA	20%
Nordics	14%

INDUSTRY	
Consumer product goods	17%
Financial services	17%
Automotive	16%
Travel and hospitality	14%
Healthcare and life sciences	13%
Retail	13%
Media and/or leisure	12%

ANNUAL REVENUE	
\$1B to \$5B	54%
\$5B or more	46%

POSITION OF RESPONDENT	
C-level executive	14%
Vice president	46%
Director	40%

LEVEL OF RESPONSIBILITY	
Final decision-maker	27%
Part of a team of decision-makers	65%
Influences decisions	8%

Note: Percentages may not total 100 due to rounding.



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