

The background of the slide features a photograph of two young women with curly hair, smiling and looking at a smartphone together. The image is overlaid with a semi-transparent blue gradient and decorative dotted lines in blue and green that curve across the frame.

Fratzke

State of Marketing 2025

What separates high-performing marketing organizations in strategy, execution, and innovation

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Introduction: State of Marketing 2025

With technology accelerating at an unprecedented pace and world dynamics shifting daily, how are marketing teams keeping up? What's the formula for success, and where are even the most confident teams falling short?

Fratzke's 2025 State of Marketing Survey captures the current landscape and reveals what today's top marketing leaders are doing to stay ahead. From strategy to execution to AI adoption, this report offers fresh insights to help teams move forward with greater clarity and impact.



James Fratzke
Partner & Executive Strategist

About the Research

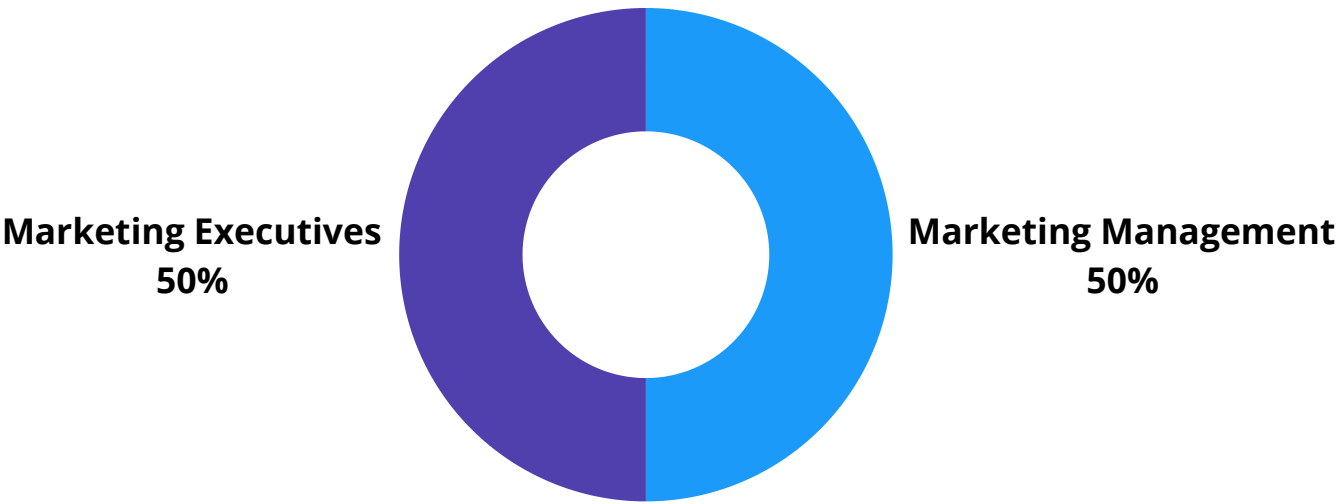
ABOUT THE RESEARCH

Fratzke’s 2025 State of Marketing Survey reflects insights from 350+ marketing leaders across a wide range of industries, locations, and company types. The group includes a mix of mid-sized and enterprise businesses across B2B, B2C, and hybrid organizations.

Respondents at a Glance

- Most work at companies with 501 to 5,000 employees and annual revenues between \$11M and \$500M
- Fairly split serving B2B (27%), B2C (32%), and both markets (41%)
- 50% "marketing executives" (director level and above), 50% marketing management (senior manager and manager level)

Respondent Position Level



Marketing Maturity Scale

Participants were asked to rate their organization’s marketing maturity using a five-point scale, defined as the following:

LAGGARD	No strategy. Marketing is reactive, fragmented, and lacks alignment with business goals.
EMERGING	Some basic tactics (e.g., email, social) exist. Efforts are inconsistent with limited data use.
COMPETENT	Strategy is defined and applied across key channels. Campaigns are consistent with basic analytics.
LEADER	Marketing is data-informed, multi-channel, and aligned with broader business objectives.
ADVANCED	Marketing is predictive, automated, and drives innovation. Fully customer-centric and performance-optimized.

"This scale provided a consistent framework to categorize organizations and compare capabilities, processes, and resources across maturity levels, enabling analysis of differences in channel investment, strategic clarity, execution confidence, and AI adoption."

Executive Summary



The 2025 State of Marketing Survey paints a clear, yet complex picture of today's marketing landscape. Confidence in marketing's role and impact is rising as most teams have dedicated budgets, defined strategies, and significant investment across channels. But many teams still struggle with executing consistently, especially those with lower marketing maturity or limited resources. As a result, a performance gap is growing between high-performing organizations and everyone else.

It's a moment of both momentum and misalignment. Marketing leaders feel more empowered than ever with confidence in the role of marketing rising across the board.

But confidence doesn't always translate into consistent execution. Many teams, especially those with less maturity or limited resources, are struggling to connect strategy with outcomes.

Despite major increases in spending across channels, too many teams are struggling to execute and unsure how to measure ROI. Execution quality and satisfaction are directly tied to an organization's marketing maturity and that's where the opportunity lies.

This report doesn't just capture what marketers are doing. It spotlights how achieving marketing maturity can be a blueprint for better business performance.

Section 1

Beyond the Budget: What Investment Patterns Say About Marketing Maturity

Leading Organizations Are Investing in Long-Term Growth

Most marketing teams today feel confident in their approach. Two-thirds (66%) consider themselves either Advanced or Competent, and 93% report having a dedicated marketing budget, indicating most organizations are treating marketing as a critical business function rather than a cost center. But where are they investing and why?

Marketing Investment Is Up Across Channels

The majority of organizations report increased investment in marketing across nearly every function. Three channels consistently lead the way with especially high investment increases:

- Performance Marketing – 78%
- Social Media Marketing – 76%
- Content Marketing – 75%

These channels are considered cornerstones of modern marketing, widely adopted and funded for good reason. As the cost of customer acquisition and paid media continues to rise, it’s unsurprising that marketing teams are doubling down on the channels most closely tied to driving traffic and achieving measurable outcomes. They remain critical levers for organizations who need both scale and speed in today’s competitive, digital environment.

Mature Teams Are Investing in Data and Strategy

While investments in these channels are up across the board, they don’t tell the whole story. Advanced and Leader organizations are doing things differently. More than 80% of high-maturity teams report increased investment not only in executional channels, but also in functions that support insight-driven strategic planning and brand-building: Marketing Analytics & Measurement, Customer Experience (CX) Strategy, Research & Insights, and Brand Strategy.



80%

of high-maturity teams report increased investment in Marketing Analytics & Measurement, Customer Experience (CX) Strategy, Research & Insights, and Brand Strategy.

Why This Matters: Planning for Long-Term Growth

This signals a clear divide. While most teams are heavily investing in lower funnel execution, Advanced and Leader organizations are also dedicating substantial resources to the functions that support long-term success. By investing in insight, strategy, brand-building, and measurement, Advanced and Leader organizations are prioritizing the internal clarity and planning needed to execute smarter, differentiate meaningfully, and work more cohesively across functions.

Marketing maturity isn’t just a self-assigned label. It shows up in how teams deploy their resources as well as how they are thinking about long-term growth.

Many organizations have laid the groundwork with budget and talent. As we’ll explore in the next section, the biggest differences emerge in how teams define and develop their strategies and whether that foundation is built for speed, growth, or both.

Section 2

Strategy Under the Microscope: Clarity, Creation, and Confidence Gaps

Many Teams Have a Strategy - Less Than Half Have a Clear One

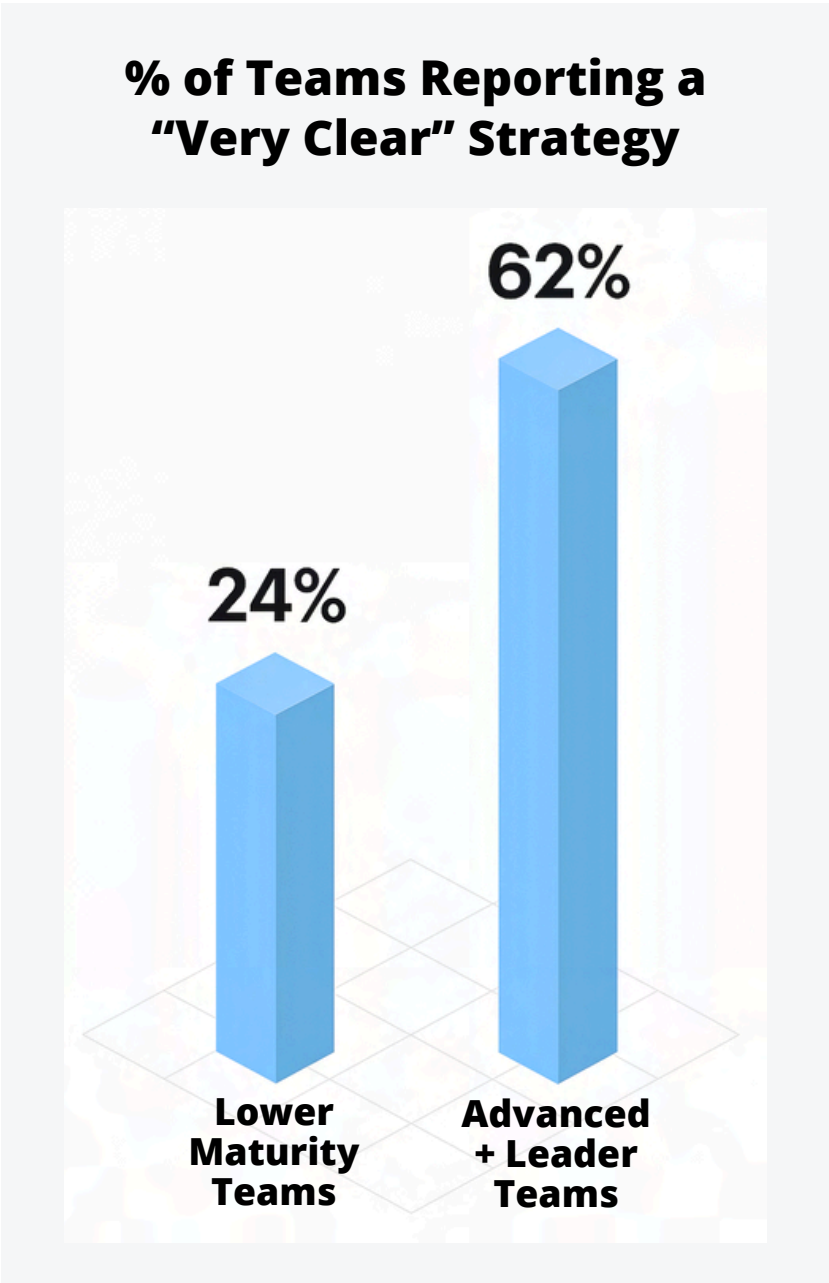
While most marketing teams claim to have a strategy, only 40% describe it as “very clear,” the level of clarity needed for alignment, focus, and execution. High-performing organizations are nearly three times more likely to report this, revealing a gap tied directly to marketing maturity. Without clarity, teams struggle to move quickly, measure progress, or scale effectively in today’s environment.

Clarity & Maturity Go Hand-in-Hand

As marketing maturity rises, so does strategic clarity. Advanced and Leader organizations consistently report stronger alignment and understanding. 62% of these mature organizations say their marketing strategy is “very clear,” compared to just 24% of lower maturity teams (Laggard + Emerging + Competent), revealing a 38-point gap between the top and the rest.

This pattern extends across key channels. More mature teams are far more likely to report clear strategies in complex, cross-functional areas, including Brand Strategy, Customer Experience, Email Marketing, Measurement & Analytics, SEO, and Social Media.

This isn’t just surface-level. Strong strategy provides the foundation for effective planning, resource allocation, and communication. Without clarity, even well-resourced teams risk misalignment and inconsistent results.



The Makings of a Clear Strategy

Clarity doesn't happen by accident. We asked marketing leaders what contributes most to making a strategy successful at their organization, and four consistent themes emerged, each reinforcing the conditions required for true strategic clarity:

- 1. Strong leadership and vision (38%)
- 2. Clear goals with measurable outcomes (36%)
- 3. Use of data and insights (34%)
- 4. Effective communication of the strategy itself (34%)

These are also the hallmarks of high-performing teams. A good strategy isn't just a document, it's a shared, measurable framework that's grounded in data, helping to guide decisions and actions across the organization. Without these foundational elements, even strong plans can fail to gain traction.

Why This Matters:

Most organizations claim to have a strategy, but most marketing leaders don't feel that strategy is clear, which can cause ambiguity and inconsistent results. Without shared understanding and the ability to track and measure progress, teams cannot move with the speed and agility the current marketing landscape demands.

“

We had the building blocks of a strategy, but struggled to get everyone on the same page. Clarifying the goals and how we'd measure them made all the difference.

- 2025 State of Marketing Survey Respondent



Section 3

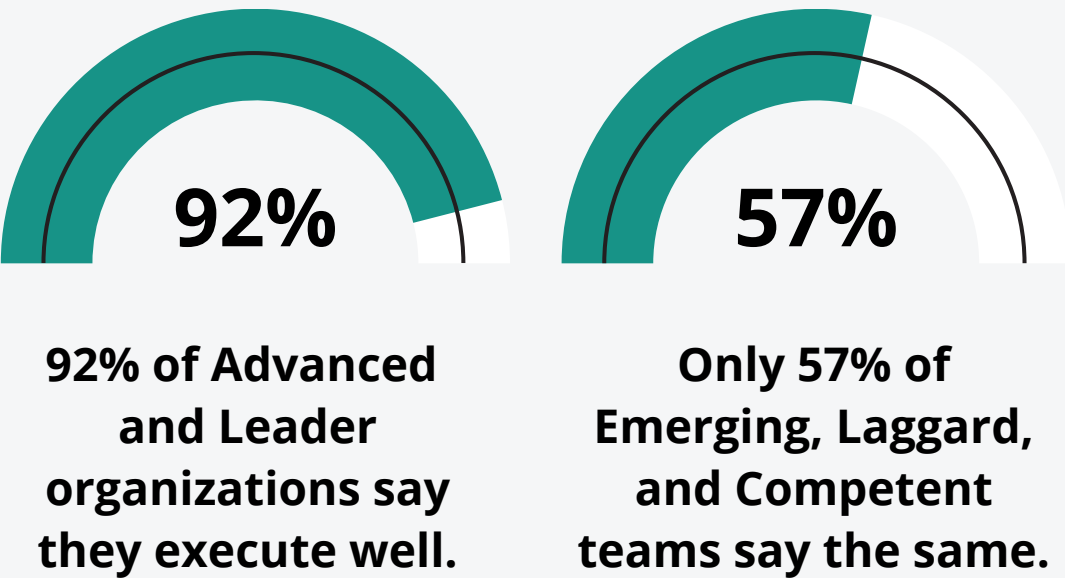
Turning Plans into Performance: What Sets High-Executing Teams Apart

Where Strategy Meets Reality: Why Execution Separates Top Teams

Many marketing teams have a strategy in place but far fewer follow through with impact. The difference isn't about budget or headcount. It's about operational clarity. High-performing organizations are far more likely to align their teams, define clear processes, and track outcomes making execution a strength, not a stumbling block.

Execution Strength Is the True Differentiator

While many marketing teams have a strategy in place, just 39% say they execute it very effectively. What separates the top performers isn't more resources. The single biggest predictor of executing with confidence is marketing maturity.



What Holds Back Marketing Teams from Executing Well?*



Structural & Operational Gaps
Many teams lack internal alignment and clear processes to turn strategy into action. Mature teams have the structure to follow through. Others do not.



Strategy Lacks Precision
“Somewhat clear” is not enough. Without a well-defined strategy, teams cannot execute with confidence or consistency.



Resource Constraints
Limited staffing, expertise, or budget clarity weakens execution, even when the strategy is sound.



Leadership Disconnect
Top-down strategy without buy-in across levels creates breakdowns in execution and momentum.

**Based on verbatim survey responses*

The Role of External Partners

To help close execution gaps, many marketing teams are turning to outside experts:

- 61% of teams use external partners
- 87% are satisfied with the results

The reasons for going outside go beyond convenience. Top motivations include:

- Better creative and strategy (49%)
- Specialized expertise (38%)
- Faster execution (36%)

Mature organizations in particular are looking for partners who can contribute to strategic thinking and elevate execution, not just add bandwidth. In fact, dissatisfaction arises when partners are seen as tactical, misaligned, or inconsistent.

Boutique and mid-sized consultancies and agencies are preferred for their flexibility, focus, and closer collaboration. They are often better equipped to deliver what modern teams need: not just output, but alignment, insight, and speed.



“ Our agency doesn’t just deliver assets—they help shape our thinking.”

Why This Matters:

Execution is where strategy gets tested. Too often it’s also where momentum gets lost. The difference between average and high-performing organizations is not just what they plan, but how they follow through on their marketing efforts. Companies with higher marketing maturity are more confident in their ability to execute, more invested in the right channels, and more likely to get value from the partners they bring in.

Section 4

AI in Marketing: Tactical Gains, Missed Potential

AI Adoption Is Rising for Marketing Leaders, but Strategic Integration Still Lags

AI has entered the marketing mainstream with 61% of teams reporting active use. Most applications remain tactical, focused on content and creative output. More advanced marketing teams are moving faster, using AI more broadly, and with greater confidence. For many organizations a lack of governance and clarity is keeping AI’s full potential out of reach.

The Confidence Gap in How to Leverage AI

Marketers aren’t lacking access to AI, but many lack a roadmap. The surge in AI adoption reflects growing curiosity and inconsistent capabilities. Many teams are unsure how to evaluate tools, govern usage, or connect AI efforts to strategic outcomes. As a result, even well-funded teams default to low-stakes tasks like content generation. What separates top performers is more than adoption, it’s also the confidence and structure to turn AI into a competitive advantage.

These teams have policies in place, frameworks for experimentation, and a clear sense of where AI adds value beyond efficiency. Without that foundation, AI remains a productivity assistant, and doesn’t grow into a strategic engine. The opportunity now is moving AI from the edges of marketing to its core.



Most Teams Are Sticking to the Basics

Today’s AI use is concentrated in quick wins:

- Content writing (53%)
- Visual generation (48%)
- Reporting and analytics (44%)
- Campaign personalization (37%)

Fewer than one in five teams are using AI for more complex tasks like media planning (16%), decision support (15%), or brand strategy (13%). For most, AI remains a production aid and not a strategic enabler.

“AI’s great for writing faster, but I don’t trust it for strategic content.”

- 2025 State of Marketing Survey Respondent

What’s Holding Teams Back?

Despite high interest, deeper integration is limited by lack of governance. Top barriers include:

- Data privacy and security (47%)
- Loss of human creativity (45%)
- Unreliable or inconsistent outputs (43%)

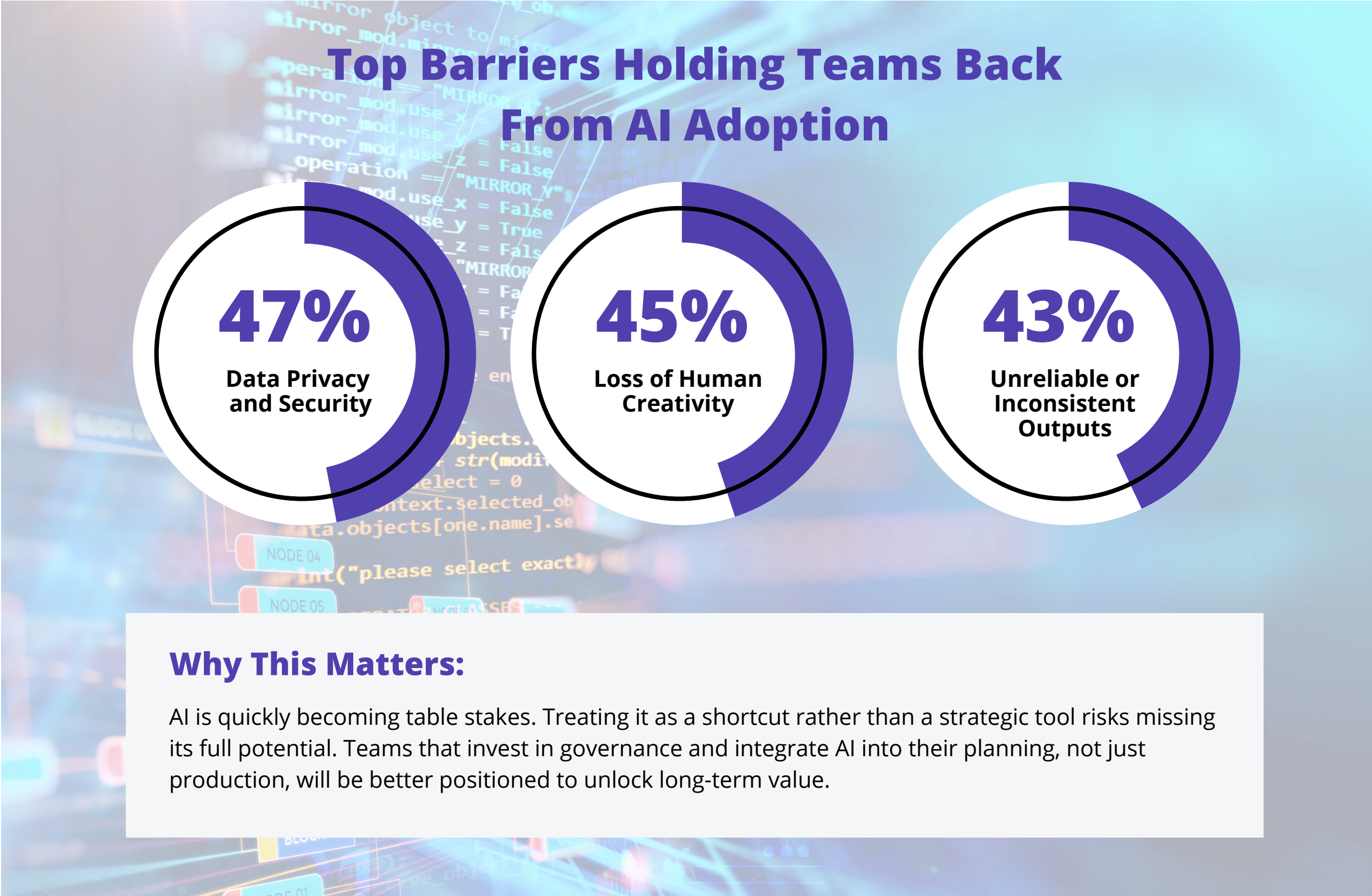
These concerns often stem from unclear internal frameworks. Without defined roles, metrics, or AI usage guidelines, many teams are left experimenting in silos.

Maturity Drives Confidence and Use

As with budget, strategy, and execution, maturity shapes AI adoption. Advanced and Leader marketing organizations are not only more likely to adopt AI, but also more likely to:

- Use it across a wider range of applications
- Trust its outputs
- Integrate it into planning and decision-making
- Track its effectiveness

In contrast, lower maturity companies tend to use AI reactively. Their efforts are often confined to content creation, with minimal oversight or evaluation. The more mature the organization, the more intentional the approach.



A Look Forward

Build a Foundation for Sustainable Growth

Marketing is continuing to evolve rapidly, but not evenly across organizations. The 2025 State of Marketing reveals a discipline in transition, where some teams are advancing with clarity and structure while others struggle to keep pace.

The gap between confident and consistent execution is widening. High-performing teams are not just spending more on short-term wins; they are investing in the capabilities that enable long-term growth. This includes investing in the research, analytics, and insights necessary to create and drive successful customer experiences, brand, and marketing strategies.

The divide between Laggard and Leading organizations can be bridged. For organizations still refining their strategy, optimizing execution, or exploring how to use AI more effectively, the path forward is within reach.

How to Grow Marketing Maturity

1. Make Strategy Actionable
Having a strategy is just the starting point. Top teams also ensure clarity, communication, and alignment so every function understands the plan and their role in it.

2. Invest in the Right Capabilities
High-performing teams invest beyond social and content, building capabilities in analytics, brand, CX, and research insights to fuel smarter, long-term growth.

3. Operationalize Execution
Execution improves with structure. Define ownership, streamline processes, and measure consistently to drive performance and accountability.

4. Find Partners That Add Value
They bring focus, alignment, and speed. Look for collaborators who feel like part of your team. In the next section, we'll share how Fratzke helps teams do exactly that.

5. Use AI with Intention & Strategy
AI is everywhere, but impact is uneven. Move past quick wins by setting clear use cases and governance so AI can enhance planning and performance at scale.

About the Authors

Fratzke Is a Strategic Extension for Today’s Marketing Leaders.

Fratzke helps mid-sized and enterprise marketing teams close the gap between ambition and execution. With deep experience across top brands and a flexible, human approach, we’re built for the realities of in-house marketing.

Many teams have strong plans, solid budgets, and expanding tech stacks, but they’re stretched thin. The pressure to perform keeps rising, while time, clarity, and support remain limited.

That’s where Fratzke comes in. We help teams move faster and smarter by turning insights into clear strategies and delivering consistent results.

How to Work with Us:

Turn Customer Insights Into Action

Use audience and competitive research to better understand your customer and guide smarter decisions.

Improve Customer Experience

Map key touchpoints and align brand, content, and digital experiences to boost engagement and drive growth.

Build Growth-Focused Marketing Strategies

Develop integrated marketing plans that align with your funnel, channels, and business goals.

Modernize Your Marketing Operation

Evaluate your tech stack and workflows, then co-design systems that improve efficiency and accountability.

Define Your Brand’s Edge

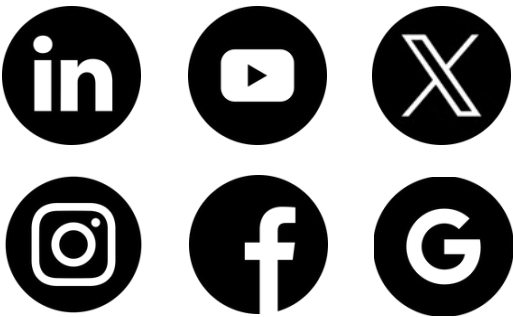
Clarify brand positioning through audits, research, and our guided ideation process to shape a clear, differentiated brand narrative.

Let's Close the Gap Between Strategy & Results

Fratzke is a strategic partner built for in-house marketing teams. We help mid-sized and enterprise organizations get the research, strategy, and insights they need to move faster with more focus, clarity, and confidence.

Whether you're looking to clarify your strategy, improve execution, or better connect marketing to business outcomes, our team can help.

Let's Talk



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