

# MARKET REPORT 2026

## Beyond CMO Trends

# Chief Marketing Officer

*Marketing Leadership in 2026: Redefining the CMO Role from a Leadership Perspective, and a New Perspective on Brand by Fredy Osterberger*

## WHAT WE SEE IN THE MARKET - THE CMO OF 2026

What our mandates tell us: at its core, the CMO role is under pressure, and the market is demanding a fundamentally different kind of leader.

- Boards expect CMOs to articulate where to compete and where not to, not just how to communicate
- The CMO who cannot connect brand to revenue will not survive the next budget cycle
- AI is raising the floor for execution, which means strategic judgment is now the ceiling
- The strongest candidates we see combine financial literacy with brand conviction
- Organizations that treat marketing as a cost center are losing the talent war — and the market share

***“The CMO of tomorrow is not hired for what they produce. They are hired for what they decide.”***

## BEYOND CAMPAIGNS - MARKETING AS A STRATEGIC FORCE

*“The function is growing. The title is the last thing keeping up.”*

Only 40% of Fortune 500 marketing leaders hold the title 'CMO', yet the function has never been more consequential. The other 60% lead marketing under titles like Chief Growth Officer, Chief Customer Officer, or SVP Marketing — a sign that the function is outgrowing its own name. As AI commoditizes execution and budgets come under pressure, one question rises above the rest: who actually owns marketing leadership?

This is not a title debate. It's a strategic one. The CMOs who win in 2026 lead with clarity, not with the biggest teams or the most sophisticated stack.

40%

of Fortune 500 marketing leaders hold the title CMO

## THE DEFINING CHALLENGE OF OUR TIME

Marketing has never had more tools, more data, or more firepower. At the same time pressure is real: shrinking budgets, shorter tenures, and a C-suite that increasingly questions what marketing actually drives. The answer is not more output, it is sharper leadership. Four forces are reshaping what it means to lead marketing in 2026:

- *AI democratizes execution - differentiation shifts to strategic clarity*
- *Brand is not being cut because it's unimportant but because it's not led*
- *The CMO who cannot quantify brand impact will not survive the next budget cycle*
- *Marketing interchangeability is rising - positioning is the only sustainable moat*

## MARKETING LEADERSHIP IN NUMBERS

The data is unambiguous: marketing leadership is being redefined - accelerated by AI, measured by commercial impact, and increasingly judged by strategic clarity. CMOs face shorter tenures, higher expectations, and a function under pressure to prove its worth. The answer, as Fredy Osterberger argues, has never been more tools - it has always been sharper direction.

**4.2 yrs**

Average CMO tenure - the lowest in the C-Suite

**72%**

of CMOs feel pressure to prove ROI within 12 months

**26%**

of marketers using AI actually generate tangible business value from it

**68%**

of marketing outputs are now AI-assisted

**3x**

higher growth for companies with CMO-CRO alignment

**64%**

of consumers prefer brands committed to sustainability

# THE MODERN CMO: FROM CAMPAIGN MANAGER TO STRATEGIC FORCE

Today's CMO operates at the intersection of brand direction, customer experience, and commercial growth. The shift is not cosmetic, it requires a fundamentally different mandate, skill set, and relationship with the CEO and board.



## CMO 1.0 The Campaign Executor

- Executes campaigns, manages channels & media budgets
- Measured by output: reach, impressions, creative quality
- Reports into C-suite but rarely drives strategic decisions
- Brand seen as communication layer, not business asset



## CMO 2.0 The Strategic Force

- Brand as a leadership instrument anchored in the C-suite
- Co-owns commercial outcomes alongside CRO & CFO
- Turns data and market intelligence into strategic direction
- Anchors brand as a fixed star: the one thing AI cannot generate for you

# TAILORING MARKETING LEADERSHIP TO BUSINESS SCALE

The CMO's core mission is consistent but scope, priorities, and tools vary significantly by stage. A one-size-fits-all approach to marketing leadership is a strategic liability.

## Start-Up & High Growth

Brand-from-scratch with limited budget. CMOs build positioning, GTM, and a marketing function simultaneously - choosing the right AI tools early is not a nice-to-have, it's the foundation.

- Drive measurable pipeline contribution: MQL quality, CAC payback, marketing-sourced ARR
- Align marketing cadence and budget to revenue targets in partnership with the CRO
- Leverage AI-powered tools to accelerate GTM execution while protecting brand authenticity

## Mid-Market / SME

Scaling with structure. The CMO balances brand building with pipeline accountability and leads org-wide alignment as commercial complexity grows.

- Own full-funnel: MQL quality, CAC payback, pipeline velocity
- Align Marketing, Sales & CS around a single GTM motion
- Implement MarTech stack & multi-touch attribution

## Large Enterprise

Global brand stewardship with commercial precision. The CMO orchestrates regional teams, investor narrative, and brand compliance at scale.

- Guide enterprise brand governance & masterbrand strategy
- Drive investor narrative & analyst relations (AR)
- Lead global marketing transformation & regional GTM alignment

## COMPENSATION BENCHMARKS

CMO and senior marketing leader compensation reflects the strategic and commercial weight the role now carries. While base salaries provide a foundation, a significant portion of total compensation is variable tied to pipeline contribution, brand equity metrics, and long-term incentives. Packages vary widely by company stage, market, and mandate scope.

Average Base Salary US  
\$220,000

Start-Ups Average Base Salary: \$120,000-\$160,000

SME Average Base Salary: \$200,000 - \$300,000

Publicly listed Companies Average Base Salary  
starting from \$450,000

Average Base Salary DACH  
€165,000

Start-Ups Average Base Salary: €90,000-€130,000

SME Average Base Salary: €150,000 - €240,000

Publicly listed Companies Average Base Salary  
starting from €300,000

## FROM ROLE CLARITY TO BRAND LEADERSHIP

We have looked at the data, the evolving mandate, and what separates strong marketing leadership from the rest. Understanding the role is the first step. The harder question is what it actually takes to succeed in it.

In an age where AI commoditizes execution and differentiation is increasingly scarce, brand has become the defining leadership instrument, and the CMOs who master it will set the agenda. This is where Fredy Osterberger comes in.

In the following feature, Fredy Osterberger shares **eight theses** on brand leadership, and Digital Future translates them into concrete leadership implications: what to look for when hiring, and what organizations must build to enable a CMO to succeed.



## FEATURE: BRAND LEADERSHIP IN THE AGE OF AI - A BRAND COMPANION PERSPECTIVE

Perhaps we're debating the wrong questions.

As AI accelerates marketing, budgets come under review and efficiency programs move into motion, a quiet uncertainty is growing. Not because we lack tools but because we lack direction. This isn't a marketing disruption; it's a leadership shift.

In a world where execution is being democratized, differentiation returns to where it has always belonged: the strategic clarity of a brand. This is not another CMO report. It's an attempt to create order through brand leadership.



*Fredy Osterberger*

Founder & Managing Director FDY Brand Positioning GmbH

30+ years of experience in brand leadership at Intel, Apple, Siemens & Atos

## WHEN AI ACCELERATES EVERYTHING — BRAND MUST PROVIDE CLARITY & DIRECTION.

Execution is becoming interchangeable. Meaning, relevance and judgment are now the true sources of value. AI accelerates marketing, making it faster, cheaper and more scalable, and therefore more comparable. The decisive factor remains unchanged: the ability to solve real customer problems in a more relevant and differentiated way. The question is no longer who produces the most output, but who defines the clearest intent and occupies the strongest strategic position. AI amplifies performance. It does not create meaning, direction, or judgment.

- Execution is becoming interchangeable. Meaning, relevance and judgment are now the true sources of value
- The key question is no longer who produces the most content, but who defines the clearest intent and occupies the strongest strategic position
- Brand sets priorities, frames decisions and defines what is relevant. This reduces complexity and enables faster, more confident choices

### **FDY** Quote

***“AI scales efficiency. Brand scales decision.”***

FDY Learning | CMO Challenge: Can you explain to your board which strategic decisions your brand enables not just which campaigns it supports? If brand doesn't simplify decisions, it's just communication.

## BRAND ISN'T CUT BECAUSE IT'S UNIMPORTANT - BUT BECAUSE IT'S NOT LED.

Decoration is optional, but direction is not. In times of economic uncertainty, brand marketing is often among the first areas to be questioned. This is not because brand lacks value, but because it is not treated as a leadership instrument. When brand is not embedded in decision making, it becomes a layer that supports communication rather than a force that shapes business outcomes. The problem is structural, not functional. Lack of ownership and executive leadership undermines brand relevance when trade-offs are required.

- Brand positioned within communications is treated as a cost center, not a strategic asset
- The problem is structural, not functional. Lack of ownership undermines brand relevance when trade-offs are required
- When fully integrated, brand moves from a negotiable line item to a lever that actively shapes budget decisions
- Anchored and led properly, brand becomes a source of clarity, alignment, and competitive advantage

### **FDY** Quote

***“If brand has no seat at the decision table, it ends up in the budget review.”***

FDY Learning | CMO Challenge: Where is brand institutionally anchored, in the communications budget, or in the strategic decision process? Without governance, brand remains negotiable.

## BRAND IS NOT MARKETING AND BRANDING IS NOT BRAND.

Brand, marketing and branding are distinct disciplines with different roles and time horizons, yet they are often treated as interchangeable. This creates confusion, weakens decisions and limits impact. When these roles are blurred, decisions lose consistency and efforts fail to compound. Teams remain active, but outcomes lack coherence because there is no shared frame of reference. Clear separation creates leverage. Decisions become faster, more aligned and more effective, enabling organizations to scale impact, not just output.

- Brand defines direction: clarity, alignment, and what the company deliberately chooses not to do
- Marketing drives market impact: translating direction into demand, visibility and momentum
- Branding shapes perception: identity, consistency and how the brand is experienced across every touchpoint
- Clear separation creates leverage. Organizations scale impact, not just output

### **FDY** Quote

***“Marketing creates motion. Brand defines the playing field.”***

FDY Learning | CMO Challenge: Is your brand definition sharp enough to end operational debates, not extend them? If every briefing starts from zero, strategic anchoring is missing.

## BRAND IS BOTH - MARTIAL ARTS AND SEDUCTION.

Competition is a contest of meaning. Strong brands do not merely participate in markets, they reshape them by challenging norms and redefining what matters. Like martial arts, brand is not about volume, but about precise, high-impact moves that influence outcomes. Brand operates in two dimensions simultaneously. It exerts pressure in the market through clear positioning that competitors must respond to, while attracting customers by creating desire, emotional relevance and preference. One without the other is insufficient.

- Strength without appeal creates resistance; appeal without strength lacks consequence
- A strong brand defines a position that competitors must respond to while drawing customers toward it
- Timing and focus determine effectiveness; precision over volume
- True brand strength is measured by its ability to influence behavior on both sides of the market

### **FDY** Quote

***“Brand must hurt competitors and inspire customers.”***

FDY Learning | CMO Challenge: Where does your brand tangibly change competitive behavior? If competitors can ignore you, your positioning is too weak.

## BRAND EQUITY IS NOT SOFT - IT'S A MECHANISM OF PRICE AND RESILIENCE.

Trust is economic. Brand equity is not an abstract concept. It directly shapes business performance by enabling price premiums, strengthening loyalty, increasing resilience in crises, and accelerating adoption of new products. These effects are not secondary. They are fundamental to creating and protecting value. Strong brand equity reduces price sensitivity and increases retention, stabilizing revenue and protecting margins. In times of disruption, it builds confidence and mitigates risk. Brand equity is a mechanism, not an image layer. It drives measurable economic outcomes by influencing behavior over time. In volatile markets, enduring brands are not the loudest, but the most trusted.

- Price stability with memory: strong brands retain margins where weak ones discount
- In disruption, trusted brands outperform because confidence transfers and risk is reduced
- Brand equity lowers barriers to innovation: existing trust carries over to new products and accelerates adoption
- Integrated into business metrics, brand equity moves from perception to a measurable driver of stability, growth, and strategic advantage

### **FDY** Quote

***“Brand equity is price stability with memory.”***

FDY Learning | CMO Challenge: Which metrics demonstrate that your brand influences margin, loyalty, or risk? If brand doesn't affect business parameters, it remains vulnerable.

## AGENCIES AMPLIFY DIRECTION - THEY DON'T REPLACE IT.

Creativity requires clarity. Strong agencies can elevate ideas and translate direction into execution, but they cannot define that direction. Their value lies in amplification, not in setting the foundation. When internal direction is unclear, agencies are forced to interpret rather than execute. This leads to inconsistent outputs and a fragmented presence that reflects shifting inputs instead of a stable position. Over time, the brand loses coherence because it is shaped externally rather than led internally. Clear direction changes the dynamic. It allows agencies to focus their creativity, make sharper decisions and produce work that consistently reinforces the same position. The result is not just better output, but cumulative impact over time.

- Without internal clarity, agencies are forced to interpret rather than execute, leading to inconsistency and fragmentation
- Clear direction enables sharper decisions and work that consistently reinforces the same position
- The result is not just better output, but cumulative impact over time
- Strong direction ensures the brand is led internally, not shaped externally

### **FDY** Quote

***“The best agency makes your direction visible, not your uncertainty.”***

FDY Learning | CMO Challenge: Can you articulate your strategic position on a single page, before you brief? If not, creativity will only amplify ambiguity.

## EVERYBODY IS IN BRANDING - BUT NOT AUTOMATICALLY.

Community is a leadership responsibility. In complex organizations, brand is shaped through countless interactions across teams, functions and touchpoints. It is not owned by a single department, but distributed across the entire organization. This requires more than alignment. It demands shared understanding, clear decision principles and structures that connect daily actions with a common direction. Without this, brand remains abstract and disconnected from how the organization actually operates. When these elements are in place, brand becomes visible in behavior. It shapes how people prioritize, decide and act across the organization. This is what turns brand from a concept into a system that continuously reinforces itself.

- Shared understanding and clear decision principles connect daily actions with a common direction
- Without structures, brand remains abstract and disconnected from how the organization actually operates
- Brand becomes visible in behavior by shaping how people prioritize, decide and act
- This is what turns brand from a concept into a system that continuously reinforces itself

### **FDY** Quote

***“Brand doesn’t live in a PDF. It lives in behavior.”***

FDY Learning | CMO Challenge: Are there real spaces where brand is debated and evolved? Without participation, strategy remains theory.

## WITHOUT CEO COMMITMENT: DON'T START.

Brand leadership is a directional decision that shapes the entire organization. Decisions of this magnitude require clear ownership at the top. Without executive commitment, positioning becomes unstable, priorities shift, and investments lack consistency. Without leadership anchoring, decisions are made situationally, alignment weakens and efforts lose continuity. The organization moves, but without a consistent direction guiding it. Where brand is anchored at the top, it gains authority and permanence, ensuring consistency across functions and over time. This is what turns brand from intention into impact.

### **FDY** Quote

***“If leadership doesn't lead the brand, the brand leads nothing.”***

FDY Learning | CMO Challenge: Is brand part of strategic discussions, or just a presentation slide? Without C-level anchoring, brand remains scenery.

Conclusion | Perhaps 2026 isn't about more campaigns, not more content, not more tools, but clarity, anchoring, and leadership. The real question is: are you leading the brand, or merely managing marketing?

*“If you don't lead your brand within the company, the market will lead you.”*

# THE FUTURE CMO: REQUIRED PROFILE

Eight theses. One conclusion: the market is rewriting the CMO profile. Not gradually, but now. The following four dimensions define what boards are hiring for, and what organizations must build around their next marketing leader.

## *Strategic Cognition*

- Articulates which markets to enter, exit, and where not to compete
- Translates brand positioning into capital allocation logic
- Operates across three horizons: identity, growth architecture, activation

## *Organizational Authority*

- Holds mandate authority, not advisory authority
- Institutionalizes brand across product, HR, pricing and innovation
- Acts as internal integrator, not campaign commander

## *Financial Literacy*

- Connects brand equity to margin expansion, churn reduction and investor confidence
- Measured on enterprise value creation not campaign performance alone
- Speaks the language of CFO and board with credibility

## *Courage & Narrative Strength*

- Defends distinctive, non-consensus positions internally
- Aligns leadership teams around strategic provocation

# THE QUESTIONS YOUR BOARD SHOULD BE ASKING

The best CMO hire starts with organizational clarity. Not a job description.

*Do you know what you're actually hiring for?*

- Marketing, Brand, and Branding are three disciplines - very few leaders master all three
- Mis-hiring happens when you need strategic redefinition but hire a campaign specialist

*Are you ready for a strategic CMO?*

- A strategic CMO will challenge decisions, reframe budgets, and demand board access
- Audit your organizational readiness, not just the candidate's credentials

*Is your CEO prepared to co-lead the brand?*

- The right CMO in the wrong CEO context will underdeliver every time
- Brand leadership is a C-suite contract, not a marketing department task

*Have you built the conditions for success?*

- Without structural anchoring, even the best CMO remains a communications manager

## VOICES OF THE MARKET

At Digital Future we continuously engage with our network of exceptional marketing leaders to stay connected to the pulse of the market. For this report, we reached out to accomplished senior marketing executives from our network - holding roles from CMO to SVP Marketing - to gather their perspectives on one of the defining questions of our time.

We asked:

*"As AI turns marketing execution into a commodity, brand becomes the last defensible differentiator. How do you lead your marketing teams through this transformative phase and where do you shift your teams' focus to?"*

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**Alexander Seiler**  
Chief Marketing Officer  
Enterprise Solutions  
@HRS Group



“I would agree that with the rise of LLM usage, Consumer centricity and consistent brand positioning are key, as they will provide product benefits users are truly looking for. However, no good strategy works without consistent, differentiated and excellent marketing execution. This kind of execution only works with dedicated experts ensuring its quality. At the same time Consumer centricity requires a level of empathy and ethical judgment that transcends pattern recognition.

As LLMs become integrated into the marketing workflow, the risk of 'brand dilution' through high-volume, low-intent output grows exponentially. Therefore an expert who understands the long-term equity of the brand is more relevant than ever. This individual ensures that execution isn't just fast, but is differentiated enough to cut through the digital noise and deliver the specific product benefits that build lifelong loyalty.”

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“The assumption behind the question is right in that execution is compressing fast. But the risk isn't that AI commoditises marketing, the risk is that it commoditises the brand itself.

When every competitor can generate the same campaigns, run the same optimisation loops, and personalise at the same speed, the output converges. And converged output produces converged perception, what I call vanillarisation.



**Oliver Garner**

Founder and Operating  
Executive

@Andoli



In practice, leading a team through this means two things. First, shifting the focus from execution efficiency to behavioural differentiation, by understanding what makes customers stay, not just what makes them convert. That means investing in switching costs, in community, in supply-side relationships that competitors cannot replicate with a prompt. Second, managing and optimising a tight marketing stack, treating every new tool as a test in itself. Not every AI capability earns its place. Marketing today is as much revenue management as it is commercial and brand, and the teams that understand that will outperform those still adding tools without subtracting cost.

AI makes the ordinary faster. The job of a marketing leader, or more importantly, a chief growth architect, now is to make sure the brand remains structurally unusual. When I see teams obsessing over ARR and conversion to the exclusion of everything else, those are the brands most at risk and it appears investors are catching on quicker than businesses themselves.”

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**David Burnand**  
Chief Marketing Officer  
@Staffbase



“The algebra of AI is simple: execution is now a commodity. If your only strategy is speed, you are joining a race to the bottom. At Staffbase, we are leaning into AI to move faster and more effectively than ever, but we are not using it to just generate more noise.

We are using it to scale the things an algorithm cannot simulate: brand, community, and incredible product marketing. Authentic content is the only scarcity left in a world of synthetic filler. AI is our engine, but the fuel is a human point of view that speaks directly to value. In this market, brand is the last defensible differentiator.

If you are not building a community with a clear stance, you do not have a brand. You have a logo.”

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“Most AI-driven marketing initiatives will fail in 2026 – not because the technology isn’t good enough, but because too many CMOs confuse automation with strategy.

When everyone's cranking out content at scale, execution just turns into more noise in the feed. Brand is what cuts through, it's that gut-level trust and clarity people actually remember when they're deciding where to spend. It is not about automating everything, but by nailing a brand promise that data and AI could then amplify.

This year will separate the brands that use AI to deepen human connection from those that use it to automate themselves into irrelevance. If your brand is already vague, AI just speeds up the fade. It scales what you've got.

So the question is no longer whether to use AI. The real call is knowing where to let machines run wild and where to keep humans calling the shots, because context and gut still beat algorithms every time. That has direct implications for how you hire, how you develop your teams, and how you design the marketing organization.

**Where AI wins:** speed, scale, optimization.

**Where humans win:** brand meaning, emotional framing, and the strategic judgment to decide what to say – not just how to say it faster. Keep creativity and brand building at the center.”



**Jochen Barann**

Former Chief Marketing Officer

@InstaMotion Retail



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“For me it has the following implications on how I shape and lead teams and where the focus should be:

**1. Hire for capabilities, not job titles.** AI fluency is a must, but I look for people who combine data with emotional intelligence and creative courage. The rarest skill in 2026 is knowing when to override the algorithm. For example, I would build roles like “creative strategists” who orchestrate AI output toward clear brand and performance KPIs, instead of just producing more assets. Asset creation is becoming a commodity. Creative direction is the human factor where you can make a difference.

**2. Invest in systematic upskilling.** Too many AI pilots fail because companies buy tools without changing how people work. I don’t just train on features. It is crucial to develop strategic thinking and brand judgment. Brand strategy can no longer sit in a siloed team or a slide deck. It has to be the shared operating system of every marketer. Therefore brand strategy is no longer the responsibility of the CMO or a dedicated brand team. It should be the DNA of every team member.

**3. Redesign roles and workflows.** Old operating models can’t deliver new ideas. My goal is to redesign marketing organizations around the customer and not channels and definitely not around tools. The output will be hybrid teams of humans and AI agents with a clear ownership of brand decisions, and workflows built for speed and meaning. The goal is not more activity, but more coherent, on-brand outcomes.

**4. Elevation of the CMO role.** The CMO of 2026 is not a campaign manager. More than ever CMOs must shift from fast-paced tactical execution to strategic and comprehensive growth and brand leadership. We will become an AI orchestrator and brand architect. It is the moment for CMOs to own brand stewardship and AI strategy at board level, ensuring that efficiency gains reinforce – not erode – the brand as the last defensible differentiator.”



**Jochen Barann**  
Former Chief Marketing  
Officer  
@InstaMotion Retail



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"We are building strong, distinctive narratives that guide our fans & customers over time. It's not about isolated campaigns, but about telling the right stories, consistently, across every touchpoint — shaping customer behavior and developing the market together with our brand.

AI is rapidly commoditizing marketing execution — it's a full reset. It forces us to focus on what truly differentiates: impact, speed, and brand clarity — across all teams at Dyn.

My teams operate around three principles:

## **1. Outcomes over output**

We don't measure campaigns, we measure business impact: growth, retention, ARPU. AI scales execution, but relevance and effectiveness come from clear goals and disciplined prioritization.

## **2. Empowerment within clear guardrails**

Speed is a competitive edge. Large parts of our decision-making sits with the team, not in layers of approval - anchored by a sharp understanding of our core audience, our brand promise, and our commercial priorities.

## **3. Brand as the North Star for every customer decision**

Brand is not a marketing layer. It's the system that guides every decision that touches the customer at Dyn. Commercial, product, communication — everything aligns to our single, clear promise."



**Max Ehrhardt**  
Chief Revenue &  
Marketing Officer  
@DYN



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“Something's shifting inside marketing teams right now, and most leaders feel it even if they haven't named it yet. All those skills we spent years sharpening: writing copy, tweaking bids, building segments, running test after test - AI is swallowing them all. The stuff that used to separate good teams from average ones? It's turning into a feature anyone can unlock for 19€ a month. Which forces an uncomfortable question: what exactly are we supposed to be good at now? I think the answer is brand. And I don't mean brand in the fluffy, logo-and-color-palette sense. I mean the messy, human, hard-to-copy thing that makes people actually care about you.

## The sameness problem

Here's what nobody talks about enough. The better AI gets at execution, the more everyone starts to blend together. We all love the idea of hyper-personalization at scale. But think about what's actually happening. Every company is running AI-optimized journeys trained on the same behavioral signals, pulling from the same playbooks, running inside the same black-boxed bidding environments. You end up with sophisticated sameness. Everything is polished. Nothing is memorable. I'm not saying use less AI. That's a losing bet. I'm saying stop treating it like your identity. It's infrastructure. Plumbing. The pipes don't make you interesting, what you push through them does.

And here's the thing people get wrong about brand. They shrink it down to marketing. Brand isn't your campaign. It's not your homepage or your Instagram grid. It's every single touchpoint. It's how your sales team talks to prospects. It's what happens when someone calls support and they're frustrated. It's the onboarding email, the invoice design, the way your CEO shows up on a podcast. All of it. The companies that get this right think about brand holistically - not as a department's job, but as an organizational posture. And that's exactly why AI can't own it. No tool is going to make your support team empathetic, or your product experience feel intentional. That takes alignment across people, and people need something to align around.”



**Fabian Nösing**

Chief Marketing Officer  
@Notebooksbilliger.de  
AG



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## So what changes day to day?

“AI handles the how. Your team needs to own the why.

That's a real shift, and it means being intentional about where human energy goes.

Think about content teams. A year ago, they were buried in production. Cranking out assets, hitting deadlines, filling calendars. Now AI can do most of that. So what should those people be doing instead? Understanding culture. Paying attention to what's actually going on in people's lives, what they're worried about, what they want, what's shaping the way they make decisions.

That kind of insight doesn't come from a model. It comes from genuine curiosity about humans.

Same thing with campaign management. If AI is handling optimization and lifecycle stuff autonomously, then your people need to step into a different role - making sure every touchpoint actually feels like your brand. That takes taste.

Judgment. A point of view. Not another dashboard.

## You have to invest in your people, seriously

None of this works if you just hand everyone a new tool and call it transformation. AI fluency has to become table stakes. Every marketer on your team needs real, hands-on experience - not a lunch-and-learn, not a PDF guide. Actual experimentation.

But the deeper work is helping people figure out where they fit alongside AI. Because a lot of smart marketers are quietly wondering if they're becoming obsolete. They're not. But they need to rediscover what makes them valuable. Sharper instincts, stronger creative conviction, the ability to ask questions that no prompt can capture. That's a leadership job, not a training job”



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## Be a little bit crazy about it

This is where I get opinionated. Innovation doesn't come from cautious organizations. It just doesn't. I've started calling it positive madness. This idea that you deliberately build a culture where people feel safe being bold. Where testing a counterintuitive idea isn't career risk, it's encouraged. Where someone can say "this is weird but what if we tried it" and the answer is "go."

Think of it this way. AI is a speedboat. Working without it is a paddle boat. You're not winning that race. But here's what matters: a speedboat with no one at the wheel just crashes into things faster. Your people are the ones steering, reading the water, deciding where to go. The speed is useless without that.

## The bottom line

The brands that win over the next decade won't be the ones with the fanciest tech stack. Everyone's going to have access to roughly the same tools. The winners will be the teams behind those tools: culturally tuned in, creatively restless, and confident enough to use AI without letting it flatten everything that makes them distinctive. AI turns execution into infrastructure. Brand - built by real people with taste, guts, and curiosity - turns customers into advocates.

**Everyone's getting the speedboat. Not everyone has the nerve to steer it somewhere interesting. That's the madness. Keep it.**



***Fabian Nösing***

Chief Marketing Officer  
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# IN DEPTH

## Digital Future Case Studies

### Senior Director Growth Marketing

B2B SaaS Unicorn | Venture Capital / Scale-Ups | ~1,000 employees

#### The Challenge

A high-growth B2B SaaS company headquartered in Germany — close to USD 100M ARR and preparing for a potential IPO — needed a senior marketing leader to own demand generation and scale marketing-generated pipeline in an increasingly competitive international market.

#### The Process

Digital Future identified candidates combining deep B2B SaaS expertise with international leadership experience in growth and performance marketing. Five candidates progressed to advanced stages, two finalists emerged from a highly qualified international pool.

#### The Placement

The appointed Senior Director Growth Marketing now leads global demand generation, drives marketing ROI through data-driven infrastructure, and plays a key role in supporting the company's IPO readiness.

### CMO/EVP Marketing

PE-Backed E-Commerce Company | Private Equity | ~500 employees

#### The Challenge

A PE-backed sports retail e-commerce company (EUR 170M revenue, 30 international locations, among Europe's leading specialist retailers) required a senior marketing leader to own the full brand and performance agenda, reporting directly to the CEO.

#### The Process

Digital Future focused on leaders combining strategic brand vision with strong operational expertise in modern e-commerce and data-driven marketing. Four candidates advanced to later stages within a short timeframe.

#### The Placement

The appointed CMO / EVP Marketing now leads brand management, performance marketing, CRM, and customer experience, strengthening digital capabilities and expanding the company's position in the European sports e-commerce market.

## SUMMARY

The modern CMO is no longer defined by campaigns but by the clarity they bring to an organization. In a world where AI executes faster than ever, the CMO's differentiator is strategic direction: knowing what the brand stands for, where it competes, and what it will never do. That is the leadership shift this report is about.

### KEY TAKEAWAYS

- Brand must be led from the top → without CEO commitment, it remains scenery
- The CMO who cannot connect brand to business outcomes will not survive the next board cycle
- Strategic clarity is a leadership skill, not a creative one
- The best CMOs define the playing field → everyone else just plays on it
- CEO-CMO alignment on brand as a strategic asset is a prerequisite, not a nice-to-have
- The CMO role is shifting from cost center to revenue driver → owning the commercial narrative across sales, customer, and product



# RECENTLY COMPLETED ENGAGEMENTS

## SaaS Unicorn

Senior Director Growth Marketing

## PE-Owned Company

CMO

## DAX40 Company

Head of Sales & Marketing

## PE-Owned E-Com Platform

CMO

## Media Organisation

CRMO

## Globally Operating

Software Group

Group CRO



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## KEY CONTACTS

# Nikolas Hoche

MANAGING PARTNER

Nikolas, Founder and Managing Partner of Digital Future, has established himself as a trusted partner for C-level mandates across digitally-driven organizations. His experience spans transformational Hidden Champions and Private Equity portfolio companies navigating complex value creation cycles. His deep understanding of digital business models across technology, innovation and commercial leadership shaped the foundation of Digital Future as a specialized boutique consultancy.

Today, Nikolas supports boards and company leaders in building, scaling and future-proofing their businesses in a rapidly evolving market, connecting them with outstanding executives from his active and unique network.



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## KEY CONTACTS

# Lucas Bechtle

MANAGING PARTNER

As Managing Partner, Lucas is the primary point of contact for our clients and advises them on top-level executive search mandates. After studying law and business administration, he gained experience in several executive search consultancies as well as within a leading start-up tech incubator.

His passion for digital business models, combined with deep expertise in executive search, led him to found Digital Future as a specialized boutique consultancy. Today, Lucas focuses on C-level appointments for Private Equity portfolio companies and family-owned businesses, supporting them in building high-impact leadership teams during critical phases of transformation and growth



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## ABOUT

# Fredy Osterberger

Fredy Osterberger is the founder and managing director of FDY Brand Positioning GmbH and a strategic partner for CEOs and CMOs. He supports companies in building their brand as an internal leadership and decision-making system anchoring it across the organization as a foundation for differentiation and sustainable competitive advantage.

For over 30 years, he was responsible for brand marketing at Apple, Intel, and Siemens, translating their principles of success into a clear system. With the FDY Brand Operating System and the Brand Companion Service, he helps companies establish brand leadership in-house — working not as a traditional agency or consultant, but as a strategic partner on equal footing who closely connects brand with leadership, organization, and execution.



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