

Mind the Gap:

Bridging the Brand-Agency Divide Before 2030

The Drum and iResearch Services explore how senior marketing leaders see their work today, and how they expect it to change by 2030.

The research reveals a sharp divide: agency-side marketers are confident they deliver what brands need, but their brand-side colleagues disagree. Understanding that gap is the first step to closing it.



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1 Introducing Mind the Gap

1.1 Summary

The two sides of marketing – the brand departments that commission the work and the agency teams that deliver it – share a similar vision for where the industry is heading. But a hidden gap between the two reveals a weakness in their combined position today, and a rougher journey to 2030 than they realize.

That divide is the central finding of this study of 600 senior marketers, evenly split between brand-side and agency roles, from across EMEA, the Americas and APAC.

Across disciplines and markets, there's plenty of consensus. Four in five (80%) expect the cost of delivering marketing to rise by 2030. Seven in ten (71%) expect AI to be a significant feature of teams and workflows. Most, on both sides, expect brands to bring more work in-house.

But there's a problem. Brand teams don't feel they're getting value from their agency partnerships and expect that in 2030, they'll be handling much more of their work in-house than agency marketers anticipate. Just 23% of brand marketers believe that agencies currently offer the capabilities and support brands need. But the majority (77%) of agency marketers think they do.

So, although their destination looks similar, agency-side marketers may find their route to 2030 more difficult than expected.

Closing this gap will take communication and evolution on both sides. But as external pressures ramp up, closer alignment will create shared advantage: better decisions, smarter investment and partnerships built around the capabilities that matter most.

At a glance



Agency-side marketers rate their offering far higher than clients do.

Among agency-side marketers, 77% believe agencies provide the capabilities and support brands need; on the brand side, just 23% agree. Almost half (47%) actively disagree that agencies are giving them what they need.



AI is widely accepted.

Across the industry, 71% of marketers expect AI to become a significant feature of teams and workflows by 2030, and 82% expect it to make their business more efficient.



In-housing is a major fault line.

Looking ahead to 2030, brand-side marketers expect more work to be handled in house than agency-side marketers anticipate, especially when it comes to core services like brand strategy.



Marketers need to redraw the relationship.

Brand-side marketers still want agencies to support with new expertise demands – emerging tech, data and integration. In-housing is evolution, not redundancy, as long as agencies move with it.

1.2 Opening note

The marketing world is going through one of its biggest-ever shake-ups. With the world-altering arrival of generative AI models, increasing pressure toward greater efficiency, and a seemingly unshakeable backdrop of geopolitical uncertainty, 2026 sees the industry at a turning point. Major players, both brand- and agency-side, are facing existential questions – questions not all of them will be able to answer. But for those who do, the rewards on offer are unprecedented.

As trade and research bodies grapple with this transformative moment, we're learning more each day about quite how rapidly the industry is changing for those two sides of the coin – agencies and brand-side marketing departments. But, until now, we've had little reliable basis on which to compare the outlooks and sentiments of those two groups directly.

That's why this research matters. By bringing together perspectives from both agencies and marketers, we can identify not only where their priorities align, but also where expectations, investment plans and perceptions are already diverging. Understanding these gaps is critical. The strongest partnerships of the next decade will be built by organisations that recognise these differences early and respond with greater transparency, collaboration and shared ambition.

The findings we present here offer more than just a snapshot of the industry today. They provide a benchmark for the future, highlighting the opportunities and challenges that will shape marketing over the coming years. Whether you're leading a global brand, running an agency or planning your next strategic move, our hope is that these insights help you make better-informed decisions and spark meaningful conversations about where the industry goes next.



Dan Botten

Head of Research & Insight, The Drum

2 The 2030 outlook: Same destination, different maps

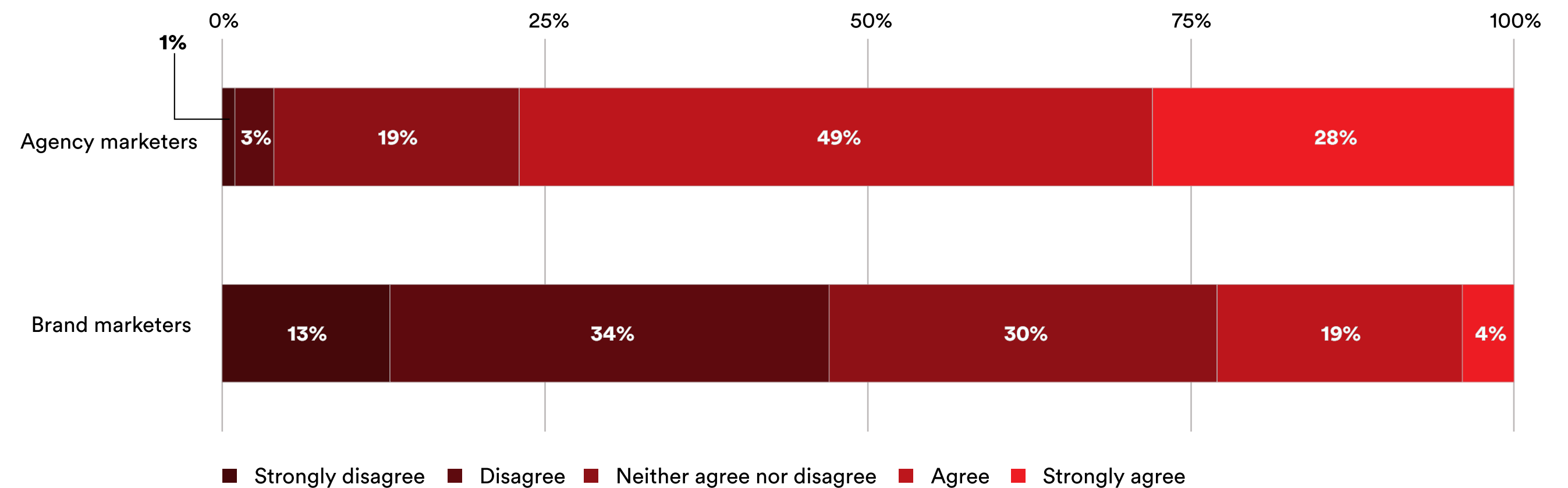
Senior marketers share a clear sense of how the industry will change by 2030: the external influences, budget limitations, and level of AI involvement. But the response to those pressures is opening a rift.

2.1 Signal failure between brands and agencies

Agency-side marketers have a rosy view of the status quo; 77% believe that agencies currently offer the capabilities and support brands need. But the feeling isn't mutual. Brand-side marketers report an exact inversion of that confidence, with less than a quarter (23%) feeling like agencies today deliver what their team is looking for.

Figure 1 : The brand-agency divide

"Agencies currently offer the capabilities and support that brands need"



N=600 (300 agency marketers, 300 brand marketers)

Source: The Drum and iResearch Services: Marketing Survey Q4, 2025

A gap of this size is unlikely to resolve itself. It suggests that brands and agencies are currently operating under fundamentally different expectations of what their partnership should look like.

Left to expand, it creates disadvantages for both sides; agencies lose client trust by focusing on services clients don't rank as priorities, while brands face the costly, slow process of rebuilding in-house the perspective and specialist depth agencies provide.

"The most widespread approach to marketing continues to be building in-house teams for strategic areas and using agencies for specialized execution. But the definition of 'specialized' is slippery and ever-changing – which means a brand and its agency can be looking at the same word and picturing two entirely different jobs."



Brittany Williams

SVP Editorial, iResearch Services

2.2 Common ground: The pressures on both sides

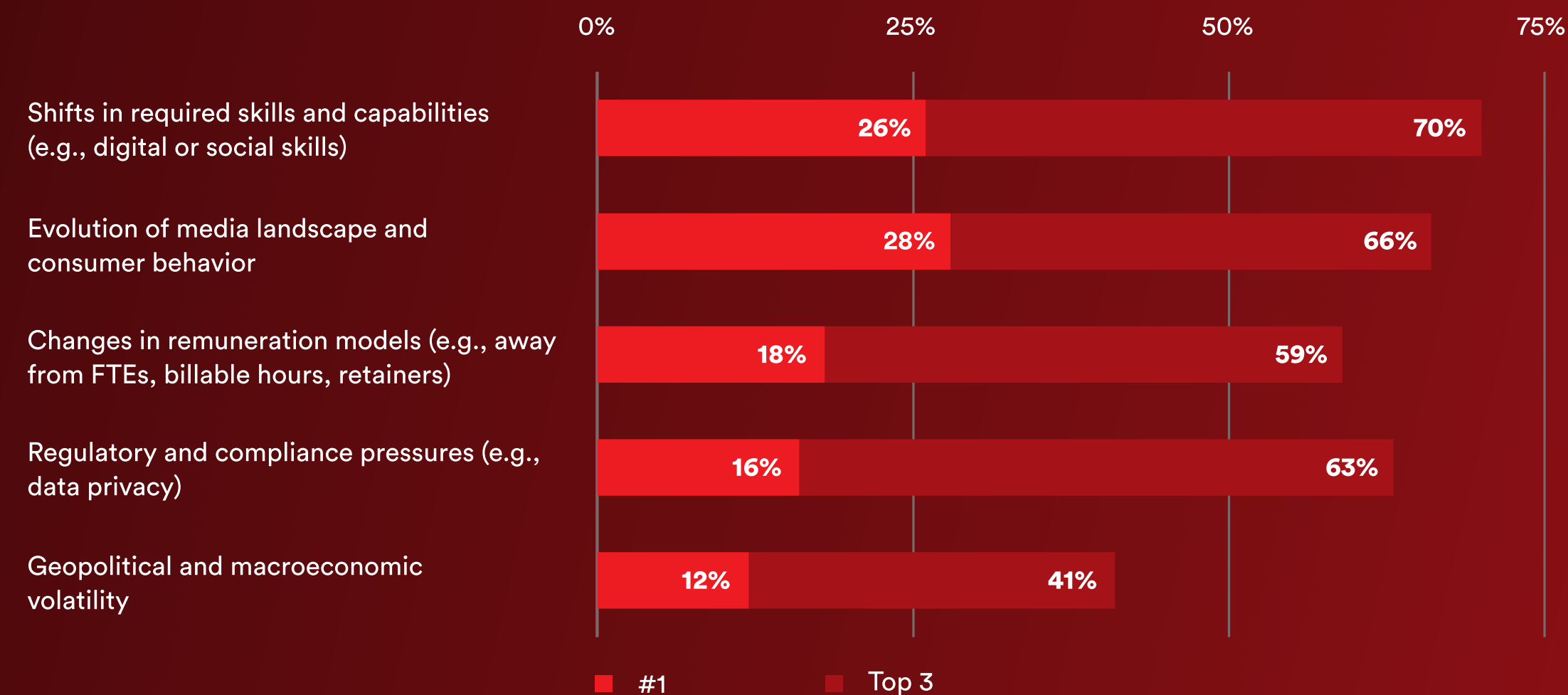
For all that divides them, brands and agencies are bracing for the same external pressures – rising costs, tighter regulation, constant change in consumer behavior, and, running through all of it, AI.

Setting AI aside, marketers collectively rank shifts in skills and capabilities (70%) and the evolution of media and consumer behavior (66%) as having the greatest impact on the industry by 2030, followed closely by regulatory pressures, and changes in remuneration models¹. No single force dominates; marketers agree that a great deal is changing, but they haven't yet agreed on what matters most.

¹ To avoid a potential landslide, we excluded AI from this list to investigate its impact separately

Figure 2: No single force dominates

The trends expected to have the greatest impact on marketing by 2030



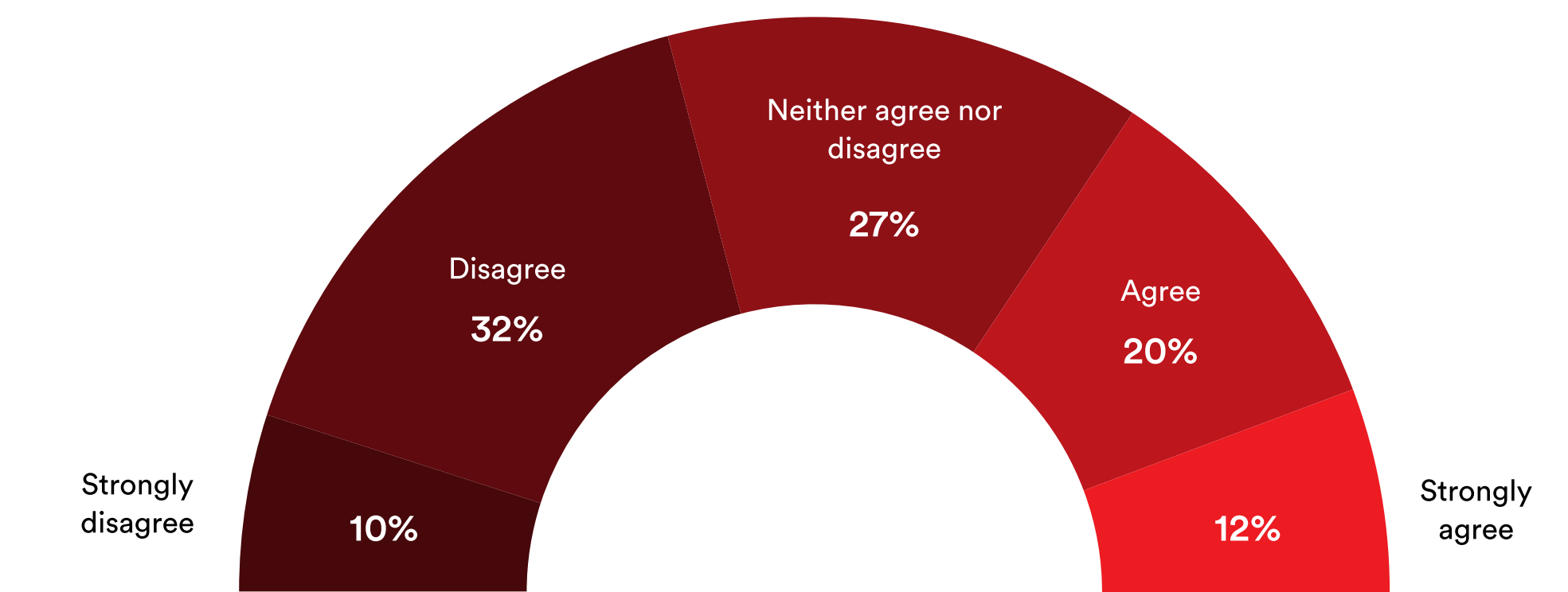
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Source: The Drum and iResearch Services: Marketing Survey Q4, 2025

Marketers expect to be tackling these influences against a background of cost concerns. Four in five marketers (80%) – brand and agency alike – expect the overall cost of delivering marketing to rise by 2030. It's a familiar challenge: only a third (32%) believe budgets are allocated efficiently today.

Figure 3: Only a third see budgets well spent

“Marketing budgets today are allocated efficiently, with minimal waste, toward what the business truly needs.”



N=600

Source: The Drum and iResearch Services: Marketing Survey Q4, 2025

“Any technology is expensive – not just AI. Your CRM is expensive, Figma is expensive, your analytics are expensive. But a proper martech stack isn't a nice-to-have; it's the arsenal a team needs to deliver – which is why cost and greater efficiency aren't a contradiction. The tools make individual processes more efficient, even as you keep investing in the wider stack. That's what any significant new technology takes before it pays off – and AI is no different.”



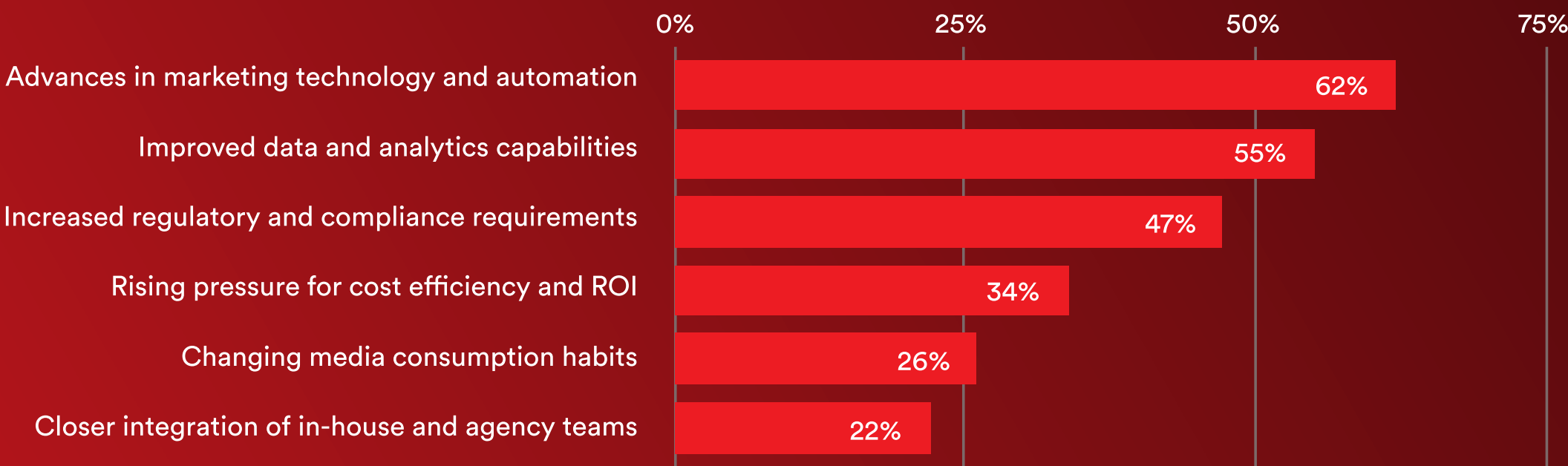
Madelaine Oppert

SVP Marketing, iResearch Services

Looking ahead, marketers anticipate technology and automation, as well as data and analytics, to be major budget efficiency influencers in 2030. It's a careful balance: efficiency gains in individual processes can sit alongside a rising total bill, as brands invest in tools, data, governance and ever more fragmented routes to market. The trap is treating any technology as a shortcut to cheaper delivery – teams will always have to spend time and money to integrate new tools and platforms effectively.

Figure 4: Tech and data drive the efficiency gains

Top contributors to budget efficiency changes in 2030



N=600
Source: The Drum and iResearch Services: Marketing Survey Q4, 2025

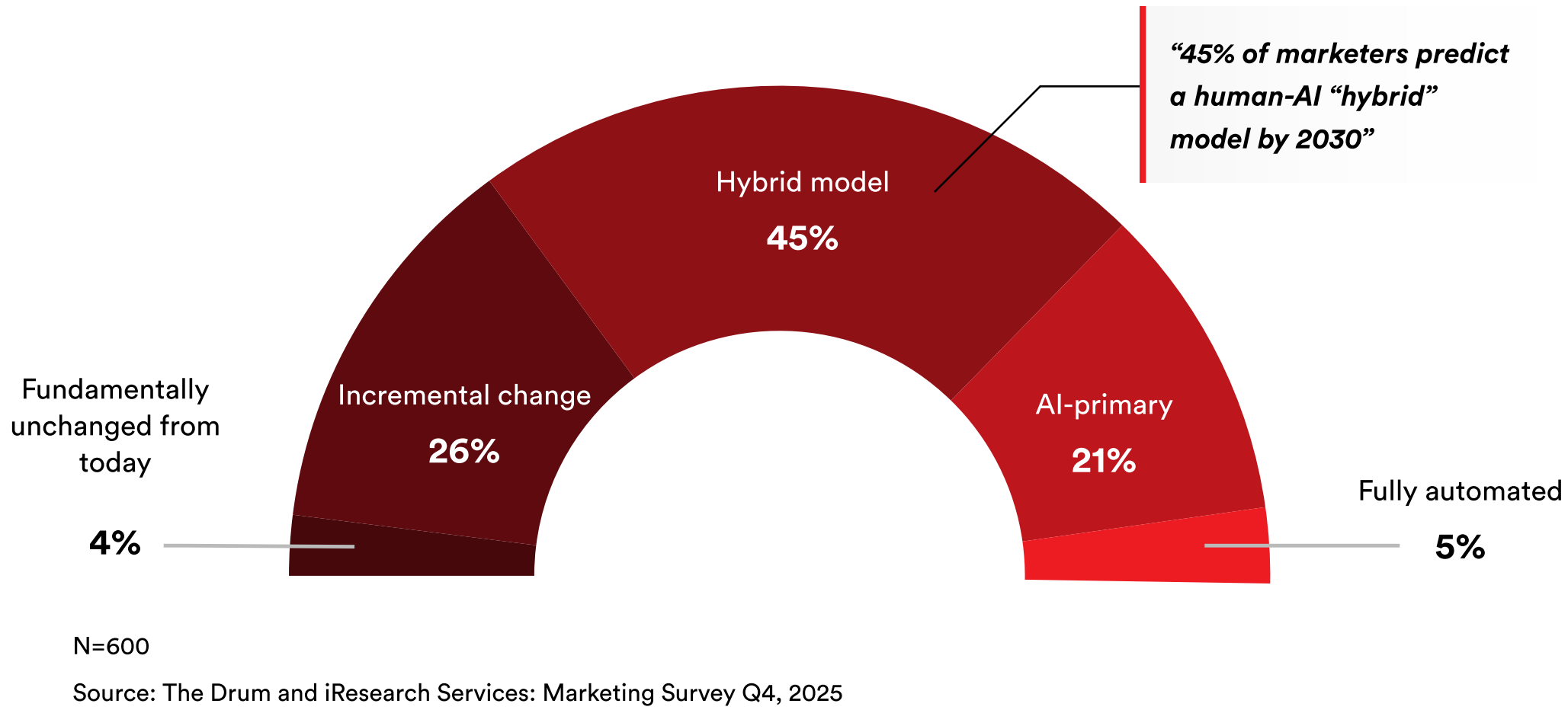
2.3 The AI consensus

AI is revolutionizing how audiences engage with content and transforming how marketing is produced, distributed, and evaluated. Across the industry, marketers are not only united in their acceptance of AI as a core feature of their work in 2030, but in their pragmatic expectations about what that will mean in practice.

Seven in ten marketers (71%) expect AI to be a significant feature of workflows and team structures by 2030. The most common expectation is that the industry will be a blend of human and machine: 45% of marketers picture a hybrid future, in which AI handles routine execution while people focus on strategy and creativity. One in five (21%) foresee an “AI-primary” 2030, where AI drives most execution, and 5% expect marketing to be fully automated by 2030.

Figure 5: Most expect a hybrid future

Which scenario best describes what you believe marketing will look like in 2030?



Scenario definitions:

- Fundamentally unchanged from today: Roles, processes, and tools remain similar to 2025
- Incremental change: AI supports productivity, but execution remains primarily human-led
- Hybrid model: AI automates routine tasks; humans focus on strategy and creativity
- AI-primary: AI drives most execution; humans provide oversight and direction
- Fully automated: AI manages end-to-end marketing with minimal human input

The mood is optimistic:

82%

of marketers believe AI will make their business more efficient

73%

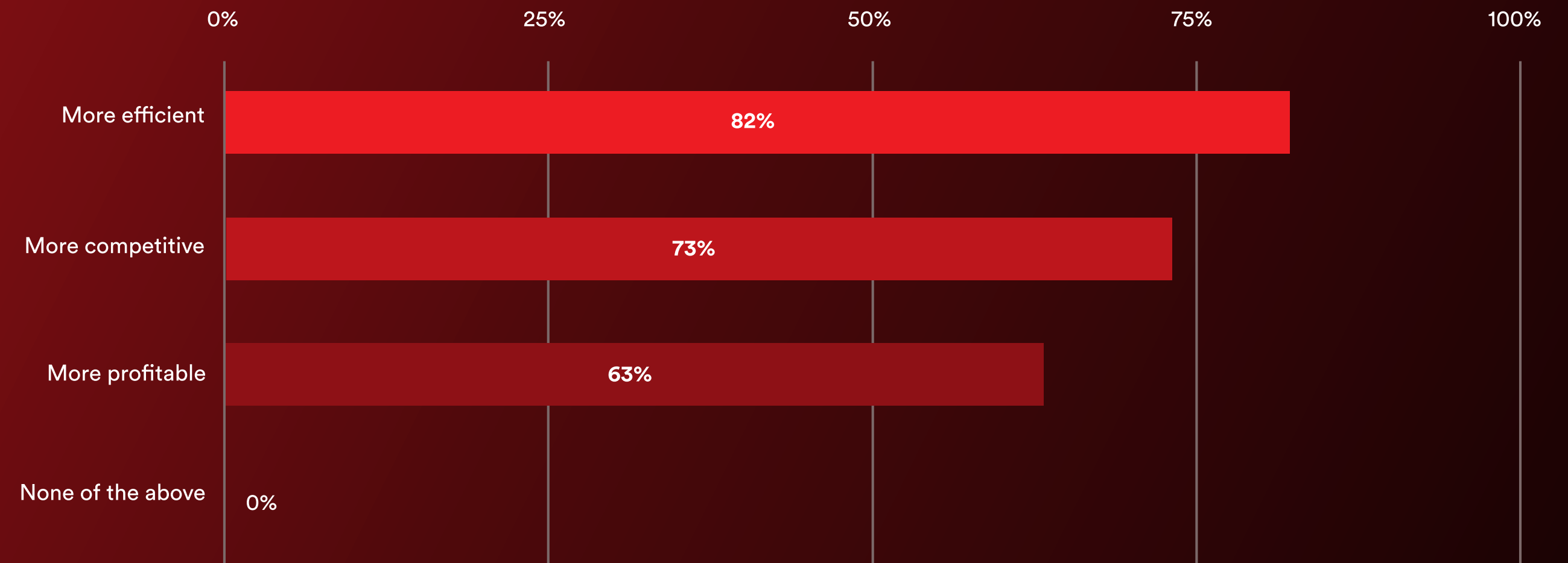
of marketers expect AI will make them more competitive

69% vs. 56%

Brand marketers are more likely to think AI will make their business more profitable than their agency-side peers (but it's a majority of both)

Figure 6: Optimism runs high on AI

“I am confident that AI adoption will make my business _____.”



N=600

Source: The Drum and iResearch Services: Marketing Survey Q4, 2025

Marketers are clear about the trade-offs to reach these gains, too; seven in ten (69%) expect the share of their budget dedicated to AI to increase. The same proportion expect the share of team time on AI to increase. But the predicted profitability and competitive benefits seem to be clear enough to these majorities to keep them running full tilt in the age of AI.

“AI can speed up nearly every part of the marketing mix, allowing teams to spend more time on deeper strategic thinking, stronger creative work and meaningful interactions with customers and colleagues. It will also change what brands expect from agencies; they will be looking to agencies to identify ways that innovative AI use could solve problems the internal team may not even have considered yet.”



Madelaine Oppert

SVP Marketing, iResearch Services

2.4 Next stop: Teams grow, roles shift

Against a widespread worry in professional industries that AI will eliminate human jobs, marketing leaders are strikingly bullish about their own headcount: 72% expect their department to grow as a share of the organisation by 2030, and only 7% expect it to shrink. It’s about role evolution – not elimination – and a shift in the balance of work within the team.

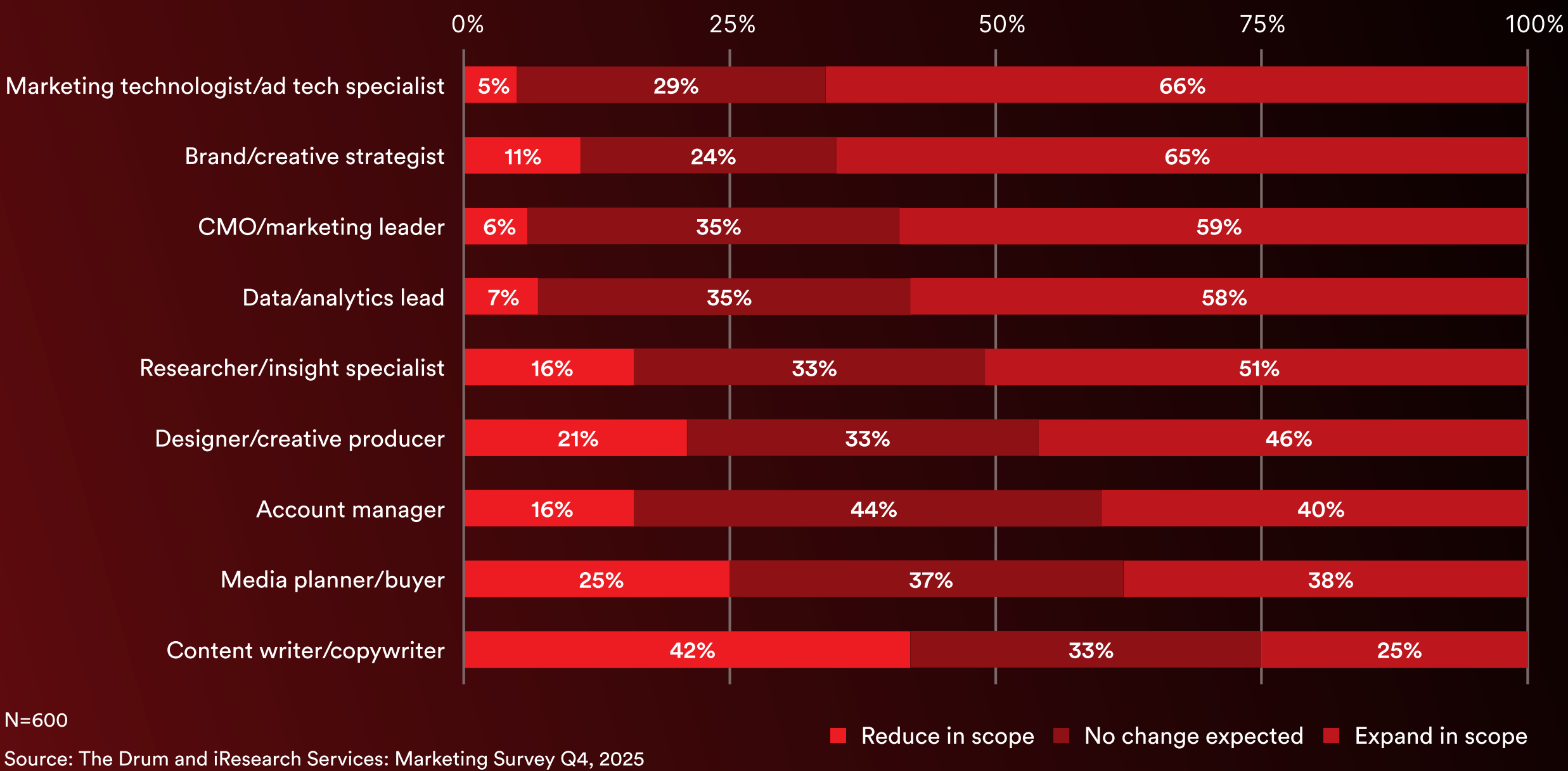
Last year, Forrester predicted 15% agency-side job losses. That prediction proved startlingly accurate, with industry body the IPA finding a 14.3% reduction in headcount at creative shops earlier this year. And while some of this may be explained by in-housing, overall marketing employment remains 27% below pre-pandemic levels. Why this optimism, then? Some may be expecting a bounce-back after these initial job losses. Others may expect whole new skills and disciplines to emerge in the agentic era. Others, of course, may be indulging in wishful thinking.

There’s a consistent pattern in the roles that marketers expect to expand and shrink in the wake of AI. Most expect AI will create more work for strategy and technology roles – martech professionals (66%), creative strategists (65%), and leadership (59%). And marketers are more likely to expect AI to absorb work from production, execution, and administration-heavy roles (designers, account managers, and media buyers). The content writer/copywriter workload is seen as the most replaceable by AI – more senior marketers expect the remit of those roles to reduce than expand.

Together, these shifts map where senior marketers expect their team’s value to concentrate, and highlight a core decision to make: if the valuable work is judgment, strategy and data, do those responsibilities get outsourced, or owned in-house?

Figure 7: Shifting responsibilities as AI absorbs scope

By 2030, how do you expect AI will affect the scope of the following marketing roles across the industry?



“At an individual level, we should be watching which roles become more generalized because of AI (and so shrink in scope) and which will remain specialized enough to be worth building a career around. Roles that become everyone’s job lose their edge. Roles that stay genuinely expert are where you put your chips.”



Brittany Williams
SVP Editorial, iResearch Services

2.5 All change: How much work gets handled in-house

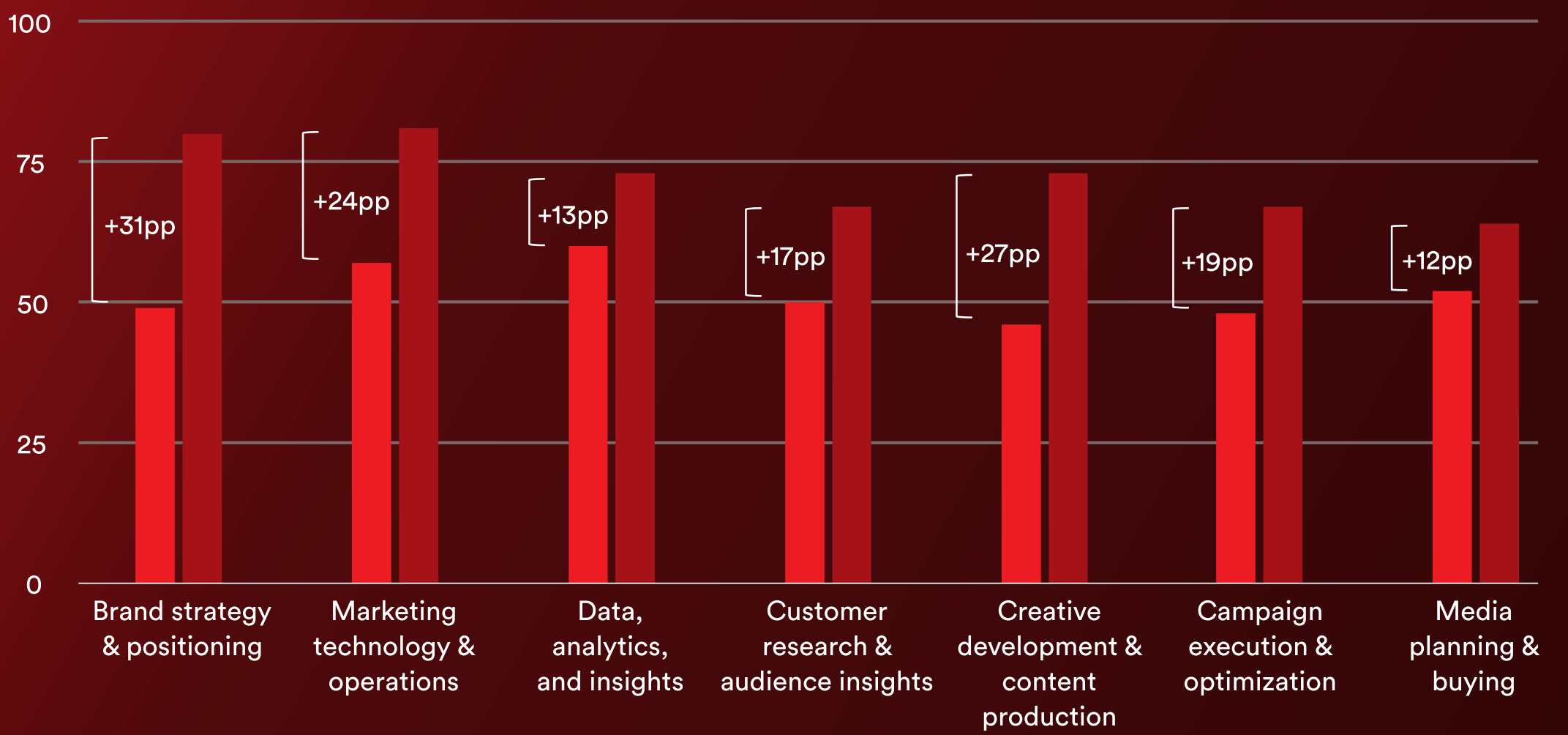
In-housing is not new. There has always been a balance of internal team capability and outsourced specialists, and it has often fluctuated. SEO, website development, social media management – these are all areas once requiring specialist agency skill that are now common fixtures in brand teams.

However, AI is accelerating the pace of what’s possible: a small team in-house can now cover ground that once took a roster of outside partners. This isn’t lost on agencies or brands – both sides of the industry believe that, across the gamut of marketing activities, in-house teams will be handling a significant proportion of their own work in 2030.

But brand marketers are much more likely than agency marketers to expect work to be done primarily or fully in-house. Depending on the activity, between 64% to 81% of brand marketers expect to handle the majority of the work internally compared with just 46% to 60% of agency marketers.

Figure 8: Two very different plans

The gap: core marketing activities expected to be managed at least primarily in-house in 2030



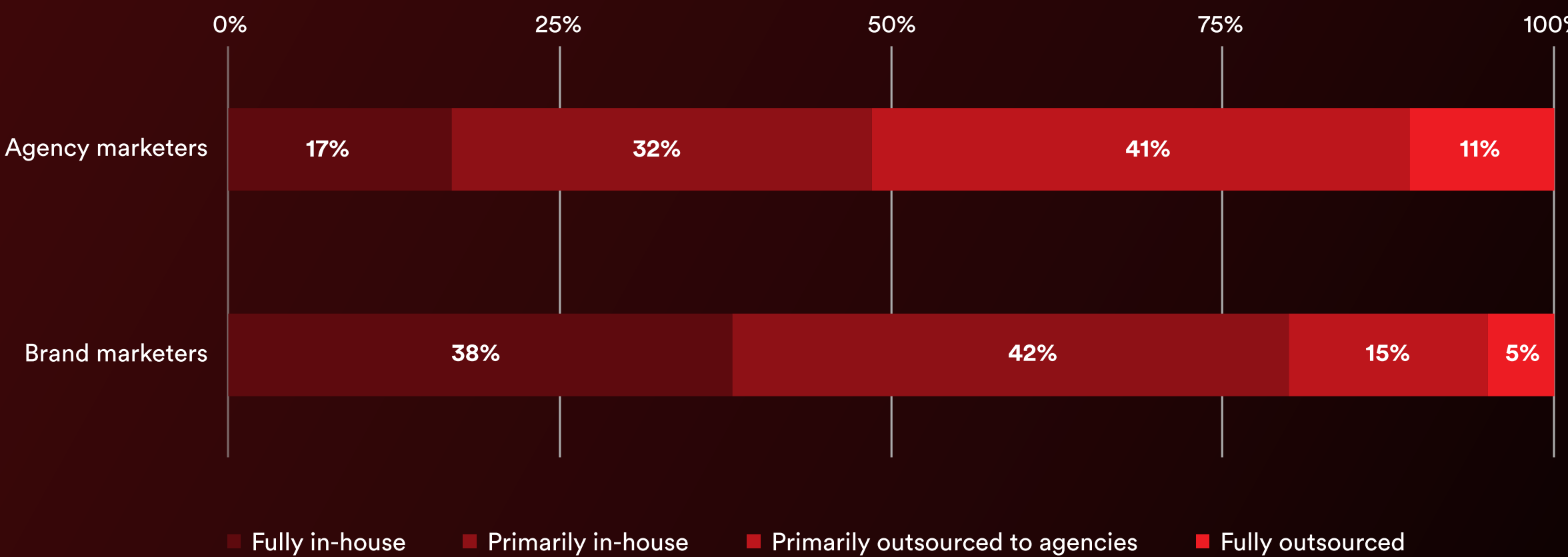
■ Agency marketers ■ Brand marketers

N=600 (300 brand marketers, 300 agency marketers)
Source: The Drum and iResearch Services: Marketing Survey Q4, 2025

The widest gaps fall on the work agencies currently identify with most: on brand strategy, 80% of brand-side marketers expect to manage it at least primarily in-house by 2030, against just 49% of agency-side marketers – a 31-percentage point gap. Creative development shows a similarly sharp divide (73% brand vs 46% agency).

Figure 9: Brand strategy: the widest gap

How do you expect brand strategy & positioning will be managed by brands in 2030?



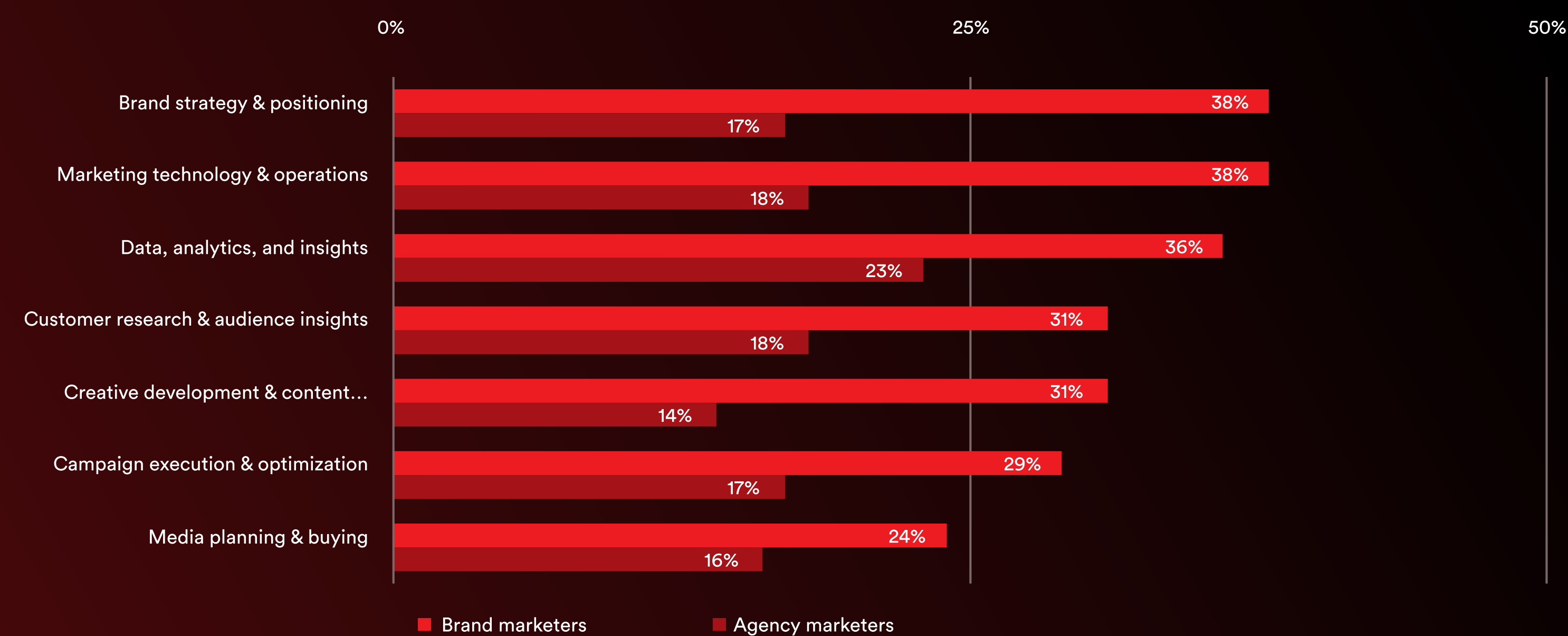
N=600 (300 brand marketers, 300 agency marketers)
Source: The Drum and iResearch Services: Marketing Survey Q4, 2025

In case there’s any doubt; across the core marketing activities, brand marketers are consistently more likely than agency marketers to expect full in-housing by 2030: on average, 32% of brand marketers expect work to be kept fully in-house, compared with 18% of agency-side marketers.

In other words, brand-side marketers are planning for a future in which more work is handled in-house than agency-side marketers expect, emphasizing the depth of brands’ dissatisfaction with current agency relationships. From their perspective, expanding internal capabilities is a natural response: if agencies aren’t delivering the support and expertise they need today, why expect those same services to remain outsourced in 2030? Particularly as AI makes it easier for in-house teams to develop capabilities that once required external partners.

Figure 10: Consistent across the board

Marketing activities expected to be managed fully in-house in 2030



N=600 (300 brand marketers, 300 agency marketers)
 'Fully in-house' responses only.
 Source: The Drum and iResearch Services: Marketing Survey Q4, 2025

Future fit is not just a capability problem, it's a relationship problem

The Drum and iResearch Services' excellent *Mind The Gap* research into how senior marketers expect their roles to evolve by 2030 echoes a challenge we've also seen in VerityRI's Future Fit Index: confidence in agencies' ability to meet future needs is declining faster than satisfaction with their current performance.

Between 2024 and the end of 2025, the gap between current agency experience and future-fit confidence doubled. By the end of 2025, one in three clients rated their agency's future readiness lower than their current experience. Among senior decision-makers controlling budgets and contracts, the concern was even greater.

Why?

Partly because agencies are caught in the tyranny of the short term. The volume of delivery, pace of change and relentless pressure for immediate results create a vortex that can make it difficult to lift heads above today's priorities. Yet clients build confidence in future partners through more than execution. They look for strategic vision, innovation and proactive leadership. The best agencies manage both.

The second factor is understanding. When clients feel understood, everything improves. Strategy, creativity, effectiveness, partnership quality and proactivity all receive higher ratings. Understanding is catalytic, it acts as a multiplier across the entire relationship. Conversely, its absence can undermine every aspect of performance.

But understanding is not something agencies can create alone.

In our Agency Barometer survey, the biggest frustration cited by agency teams was poor client briefing and direction, rising from seventh place the year before. Complaints increased by 50%, with agencies reporting unclear objectives, shifting priorities, conflicting stakeholder feedback and limited alignment around goals. Information is often shared late, inconsistently or without sufficient context, forcing agencies to hit moving targets.

The industry's future-fit challenge may therefore be less about capabilities than conditions. Agencies cannot demonstrate strategic foresight if they are denied visibility.

Clients cannot expect deep understanding without transparency.

As change accelerates, the most valuable partnerships will remain those built on shared agendas, openness, trust and long-term thinking. Future fitness is not something agencies create for clients. It's something both sides must build together while having belief in the immense value that together they can continue to unlock.



Anna Hopwood

Chief Client Strategy Officer, VerityRI

2.6 What brands still want from agencies

If in-housing is inevitable and AI is a viable way to close internal skills gaps, agencies need to evolve, fast.

Fortunately, brand marketers are transparent about where they might want help in 2030. Deeper expertise in emerging tech (including AI) is the top ask, followed by a stronger focus on data, analytics and insights, and better integration with in-house teams. And they're less interested in pricing transparency or strategic guidance than agency marketers might expect.

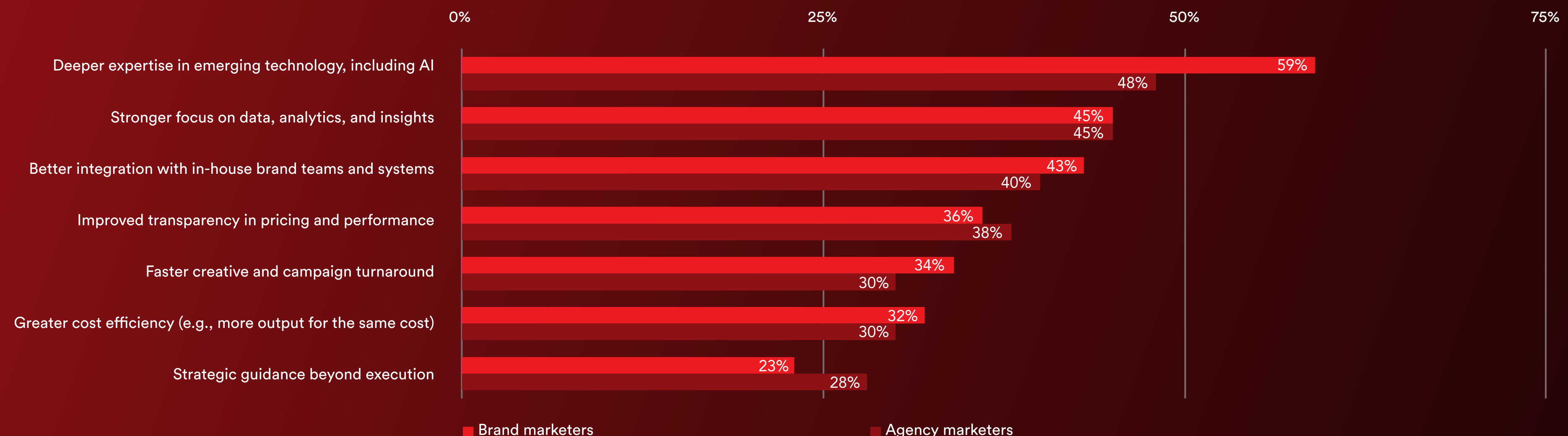
The gaps here are narrower, but they point to where agencies are most exposed. Agencies that continue to pitch strategy as a core service, for example, may be fighting an uphill battle when it's exactly the work brand-side teams are determined to bring in-house.

The gap between agencies' and brands' ranking of the importance of strategic thinking will perk up ears agency-side, with many shops still amid a 'strategic pivot', moving higher up the food chain from delivery. While agencies shouldn't infer that clients are no longer in strategic thinking, it might indicate that they don't want to pivot too fast away from the things they've already sold (especially if they include data, analytics or insights).

Agencies aren't the only ones at risk. Bringing work in-house can give brands more control, but it doesn't guarantee better outcomes. The same gaps in AI expertise, data capabilities or team integration can exist inside an organization, especially when those functions are still being built. Avoiding the relationship problem doesn't solve the capability problem.

Figure 11: What brands actually want

Looking ahead to 2030, what changes will brands need most from agencies?



N=600 (300 brand marketers, 300 agency marketers)

Source: The Drum and iResearch Services: Marketing Survey Q4, 2025

3

Rebuilding the partnership: practical moves for both sides

Mind the Gap suggests there's little disagreement among marketers about the direction of travel. By 2030, they broadly expect AI to play a larger role, for team roles and composition to shift, and for a substantial proportion of work to be handled in-house. The question now is: how can agencies strengthen and adapt their role within that future?

The research exposes a growing disconnect. Brands are planning to bring more work in-house, while agencies remain confident that they are delivering what clients need. If both sides continue on their current path, that gap can only widen.

The most successful partnerships will be those that recognize in-housing as a chance to work differently. Brands still need expertise, perspective and specialist skills; agencies need to show their value in areas clients cannot easily build for themselves.

Closing the gap will require a reset on both sides. Here are the moves that can help it happen.

For brands



Brief the business objective, not just the deliverable.

Give agencies the commercial KPI and the corporate priority behind your request, not just the asset you want produced. An agency that understands the outcome you're accountable for can build toward it and push back when the brief and the goal pull in different directions – and avoid sending work that meets the spec but misses the point.



Be open about what you have and what you lack.

Give agencies an honest view of your internal capabilities, your constraints and the people and data they need. Guarding that information only increases the likelihood of generic output that feels like work your internal team could have done, instead of adding power where you actually need it.



Time in-housing deliberately.

Bring an activity in-house when it is becoming a genuine core capability, or when it generates first-party data worth owning; those are the two tests that matter. Move too early and you carry the cost before you have the competence; too late and you have already leaked the advantage. Getting that timing right is fast becoming a test of leadership.



Keep your customer insight current.

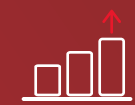
Your work is only as sharp as the customer understanding it's based on. Before bringing work in-house, check your research and customer-feedback loops are still telling you about today's customer – not the ones you had when you first set those systems up.



Protect learning time.

Upskilling is no longer something people do around the edges of a full role; it is part of the role. Five per cent of a working week is two hours – enough to matter, small enough to grant. Teams given that time compound their advantage; teams denied it fall quietly behind.

For agencies



Prove capability with evidence, not pitch assertions.

Brands are asking, in plain terms, for deeper expertise in tech, data and integration. Meeting that means showing the work (the case, the method, the result) not asserting it in a deck. What brands reward is demonstrated expertise delivered consistently, not a strong pitch followed by a quieter reality.



Work beyond the brief.

The agencies brands keep are the ones that interrogate the brief and come back with "you asked for this, but here's your real goal, and here's how we'll hit it." Delivering exactly what was requested, and nothing more, is what turns a partner into a vendor. A hard brief is not a burden but a signal of trust – and the chance to earn the next one.



Stay a step ahead of your clients.

Build learning into how your team runs, so that when a client asks whether they should be doing something with a new tool, the honest answer is "we've already tested it – here's what we found." An agency learning at exactly the same pace as its client creates friction, not value; the point of the relationship is for you to be further down the road.



Earn trust through the fundamentals.

Deliver on time, communicate clearly, be accountable, and be straight about who is actually working on the account. It sounds obvious, but it is the groundwork the data says is missing, and the platform everything else – from strategic guidance to specialist depth – has to stand on.

Closing note

Reconnecting starts with trust. This report shows how far expectations have drifted: 77% of agency marketers believe agencies provide what brands need, but only 23% of brand marketers agree. An agency has to operate as an extension of the marketing team, which includes understanding the brand's priorities and marketing's commercial targets. Trust comes from delivering on time, communicating clearly, and being accountable.

The research shows what brands want from agencies: expertise in emerging technology, stronger data and insight, and better integration with in-house teams. Brands need expertise they cannot easily build alone, an outside perspective, and a point of view. Otherwise, what is the agency for?

After 20 years on both sides, I know the distinction between a supplier and a partner. A partner does not just work harder on the brief; it works closer to the business. When I get on a call, I want to hear: "The commercial KPIs you gave us were X. We tried this, it did not work, so here is our next step and how it gets you there."

In-housing raises the bar further. When 80% of brand marketers expect brand strategy to be owned in-house by 2030, compared with 49% on the agency side, agencies need an edge of their own: service, trust, expertise and credibility.

AI does not change that. It cannot supply the experience, instinct or taste that makes work distinctive. The research points to a practical response: 82% expect AI to improve efficiency, while the most common expectation is a hybrid model. So, before anyone panics, stop, make a cup of tea, breathe and ask where AI can help now. Its real gift is time, reinvested in sharper thinking and closer attention to the customer. The divide is big, but it is fixable. Closing it starts when both sides work from the same picture of what value really means.



Madelaine Oppert

SVP Marketing, iResearch Services

Closing note

I'd love to talk with the 5% of our sample who expect marketing to be fully automated by 2030 – their resources must be extraordinary.

Because it's the 'roaring 2020s', but depending on where you look, plenty of businesses are still operating like it's the 1920s. A 2019 study in the Journal of Information Sciences found most small businesses still lacked integrated, computerised accounting systems; a 2025 survey of 500 US professionals found nine-plus hours a week lost to manual data entry, and 46% who'd never used an automation tool.² We are some way off ubiquitous, AI-native operations on every corner.

Still, AI is both a threat and a promise: it can boost your team, but it can also act as a substitute for your product, or lower the barriers to new entrants. It's difficult to truly replicate a whole business's skills with nothing more than ChatGPT Pro in your pocket – though crazier things have happened.

The measured response isn't panic; it's learning. Anyone building a business career now has to learn AI – and lead their teams through it too. At iResearch Services we treat skill-building as part of everyone's job: constant, low-stakes tinkering, so that when a client asks, "should we be doing something with this?", the answer is "we already have – here's what we learned."

Prioritizing learning time is a small move that compounds enormously. Five percent of a 40-hour week is two hours. If you're a team leader, can you give your team that? The teams that make that time will be the ones shaping what comes next.

² Parseur, "Manual data entry report" (2025), survey of 500 US professionals: <https://parseur.com/blog/manual-data-entry-report>



Brittany Williams

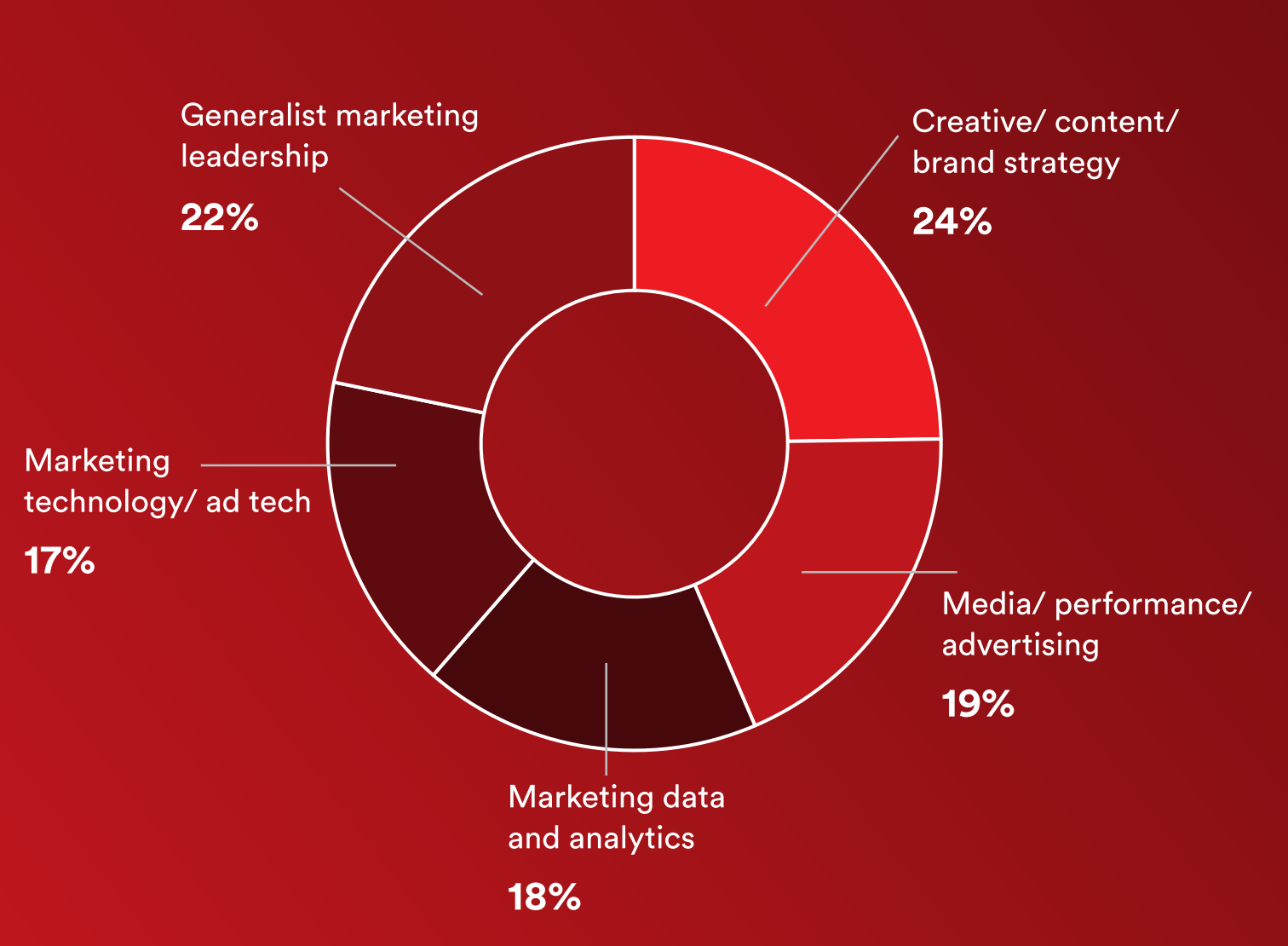
SVP Editorial, iResearch Services

About the research

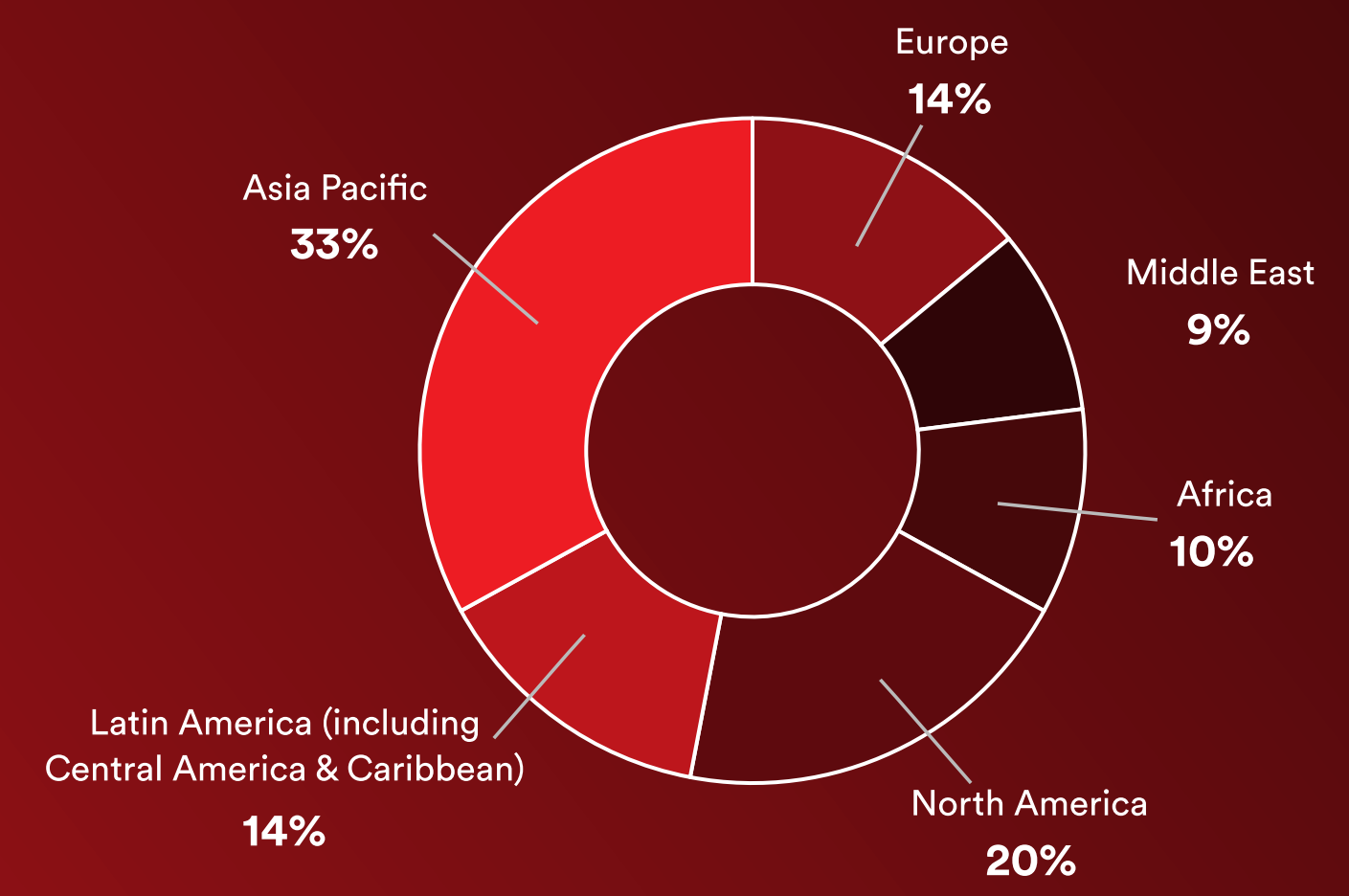
Mind the Gap is based on research designed by The Drum and iResearch Services, fielded October to November 2025.

Its global sample of 600 senior marketers comprised 300 in-house brand marketers and 300 agency-side marketers (200 from EMEA, 200 from the Americas and 200 from APAC). All respondents were director level or above, representing organizations with an average annual revenue of \$346m.

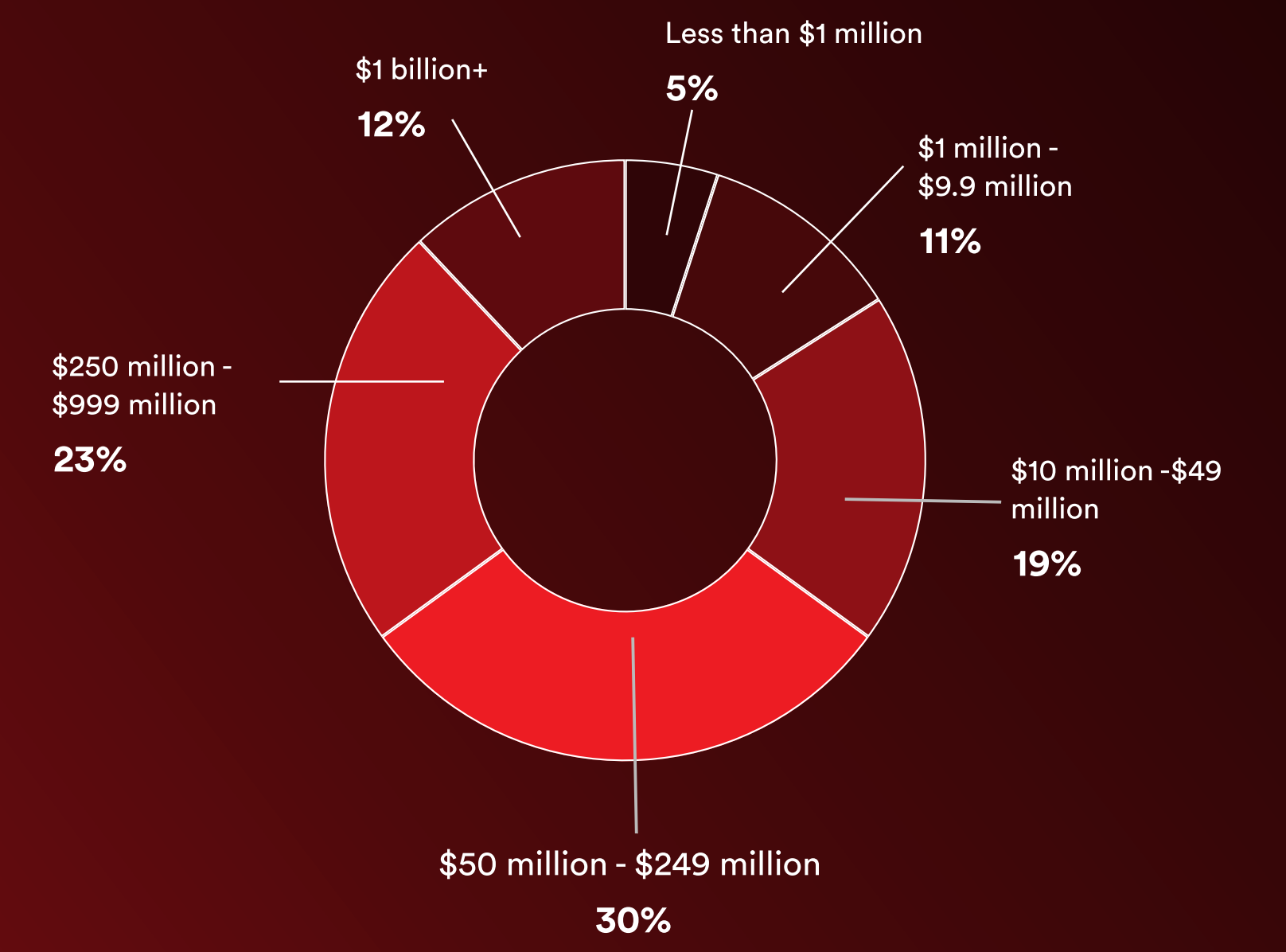
Respondent specialisation



Respondent base region



Respondent organization size (revenue)



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