



The AI Marketing Pulse

Tracking AI maturity in marketing

Wave One – Q4 2025



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INTRODUCTION

A health check on AI for marketing

Almost overnight, AI has become marketing's new muscle memory. It's in every workflow, every brainstorm, every campaign timeline – and ChatGPT has only turned three. But adoption isn't the same as maturity. And confidence isn't the same as control.

AI has shifted from experiment to expectation. It now powers briefs, optimizes media, generates content and shapes strategy – often faster than organizations can keep up. But while adoption has surged, understanding hasn't. Marketers are confident in AI, but not always in control of it. They feel ready, yet still held back by skills, data and ethics.

The AI Marketing Pulse is The Drum's quarterly benchmark tracking the sentiment, signals and surprises shaping AI in marketing. Built in partnership with GUT Network, Wave One sets the baseline: strong momentum, big contradictions and a marketing community moving fast without always knowing who's steering.

This is the first chapter in an ongoing investigation into how marketers are really adapting – and what they still need to figure out next.

THE DRUM'S TAKE

“Wave One makes one thing clear: marketers aren’t struggling to adopt AI – they’re struggling to keep up with the consequences of adopting it so fast.

The industry is pushing ahead with confidence, but the foundations underneath that confidence – skills, data, governance, ownership – haven’t matured at the same pace.

AI is accelerating marketing, but it’s also widening the gap between what teams can do and what they’re truly ready to manage.”



Steve Antoniewicz
SVP, The Drum

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METHODOLOGY

Reading the pulse

QUANTITATIVE

Online survey of 50 senior marketing decision makers at brands (US 50% / UK 50% split).
Fieldwork: October 15-24, 2025

QUALITATIVE

In-depth interviews on topics surrounding the pulse areas of focus with marketing and strategy leaders across GUT Network, The Drum's CMO community and The Drum Awards juries.

INTERVIEW FOCUS

AI maturity, readiness, governance, adoption, outcomes.

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EXECUTIVE SUMMARY

The diagnosis

ADOPTION IS PAST THE 'PILOT' PHASE

6%

**say they're still
experimenting**

Everyone else is integrating (38%),
embedding (32%) or fully operational
(24%) with AI.

CONFIDENCE AND CAPABILITY ARE SKY-HIGH – BUT ARE THEY TOO HIGH?

92%

**feel personally
confident using AI
in their strategy**

96% rate their team's AI capability as
high – yet more than half (52%) say skills
are a top barrier.

POLICIES EXIST – BUT ANXIETY PERSISTS

74%
have formal,
documented AI
policies in place

Yet 64% still have worries about ethical or reputational risks.

FASTER? BETTER? MAYBE
BUT NOT CHEAPER

64%
report no cost saving
from current AI adoption

78% say AI is saving time – while only 36% report that it's saving them money.

INCREASING APPETITE FOR INVESTMENT

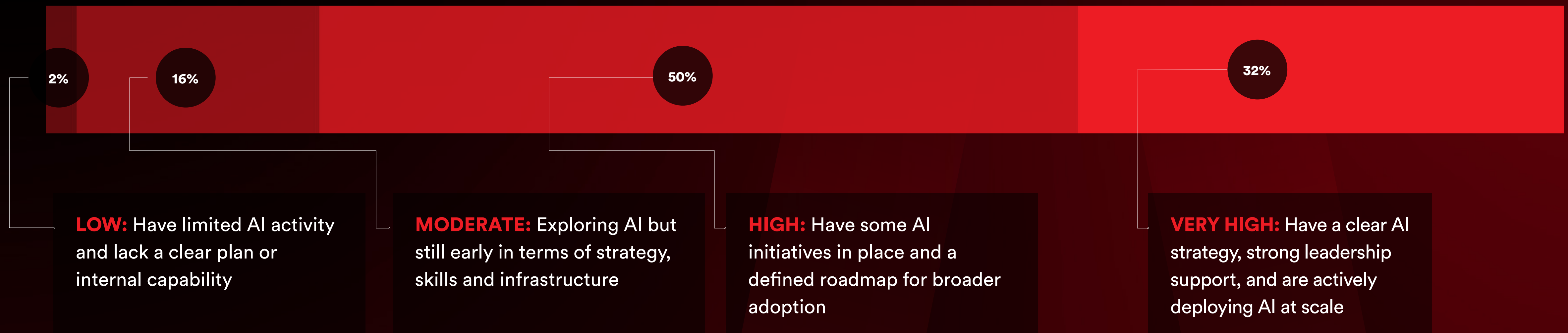
92%
expect AI budgets to
increase in the next year

With 40% saying that's coming from net new investment, not reallocation.

Ready or not, here AI comes...

82% of marketers say their organization is AI-ready. AI isn't a future ambition anymore, it's becoming business-as-usual, with most organizations already building, scaling or activating real AI programs.

HOW WOULD YOU RATE YOUR ORGANIZATION'S OVERALL AI READINESS?



Who's leading the charge?

AI adoption isn't being led from marketing – it's being driven by the horizontal functions that sit across the enterprise. Innovation leads, tech teams and cross-functional groups are shaping the agenda, not CMOs.

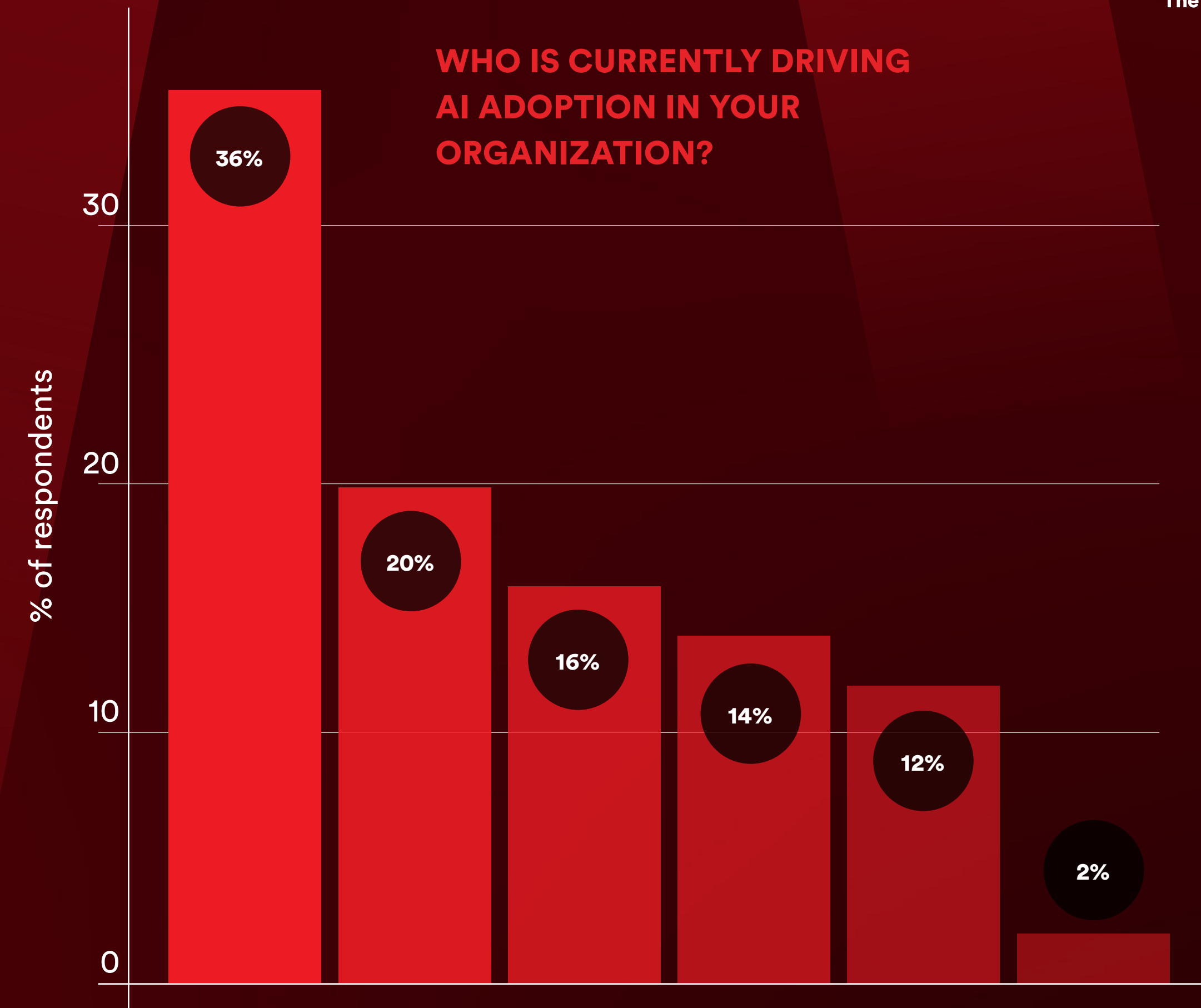
The risk for CMOs is clear: when they don't fully own AI, progress slows, governance blurs and capability gaps widen.

The opportunity: the right partners can help them move faster, work safer and turn AI's potential into measurable outcomes.

“We all have cars. But you want to be the one in the Ferrari. AI is the Ferrari – it's the tool that takes you further, faster. But you still need the driver.”



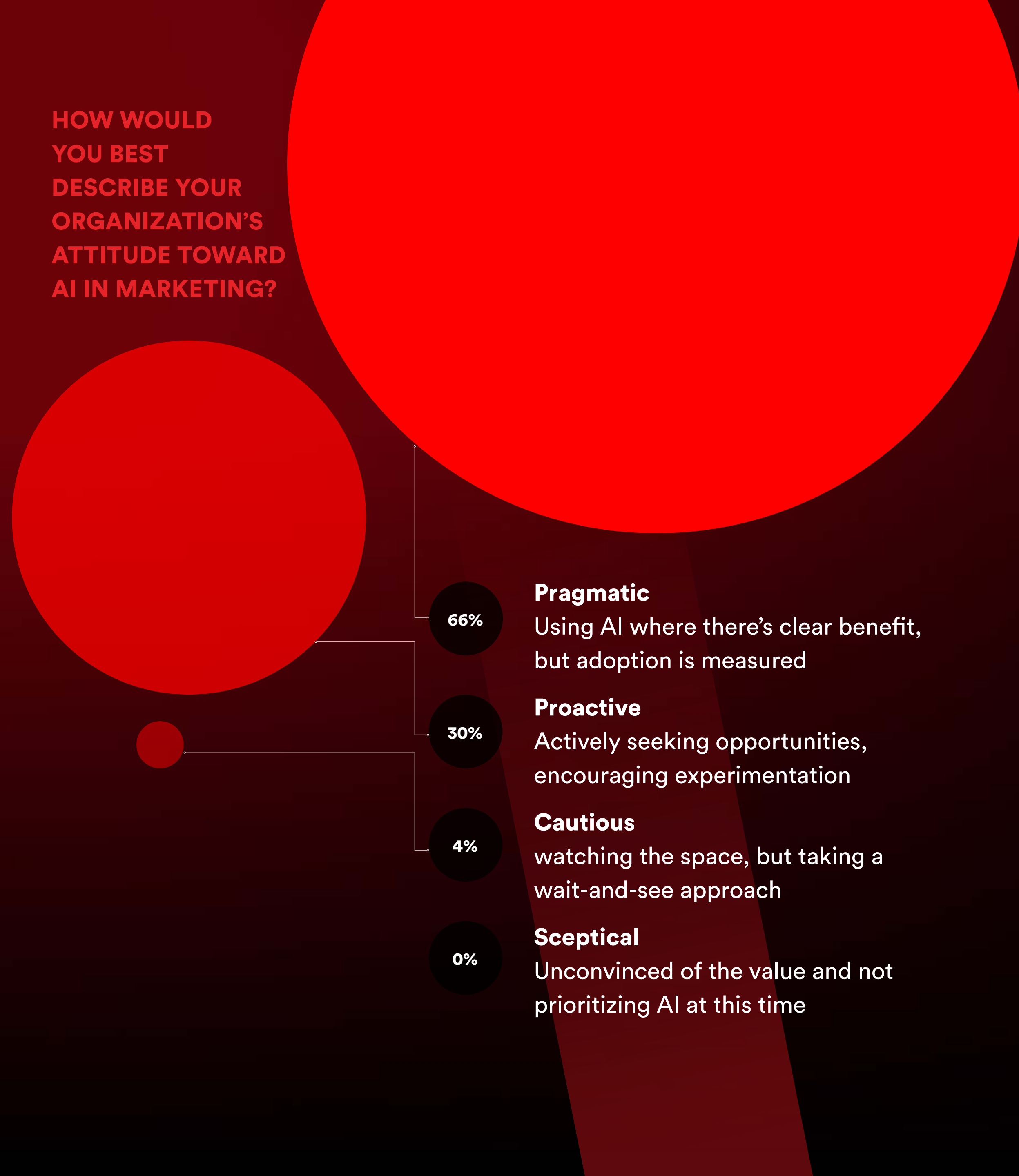
Kim Plesner-Jacobson,
senior VP, global digital transformation
GUT Network



36%: Innovation lead
20%: CTO/CIO
16%: CMO

14%: Agency/consultancy partner
12%: Cross-functional taskforce
2%: No clear owner

HOW WOULD
YOU BEST
DESCRIBE YOUR
ORGANIZATION'S
ATTITUDE TOWARD
AI IN MARKETING?



Pragmatic

Using AI where there's clear benefit, but adoption is measured

Proactive

Actively seeking opportunities, encouraging experimentation

Cautious

watching the space, but taking a wait-and-see approach

Sceptical

Unconvinced of the value and not prioritizing AI at this time

Business attitudes to AI

On paper, the enterprise looks ready for AI: budgets are climbing, confidence is high, and governance is formalizing. Yet in practice, most are taking a measured, intentional approach.

Why? Because even as AI proves its value, the real use cases are still being defined. Teams are figuring out where AI accelerates work, where it enhances creativity, and where it risks eroding the very thing that makes brands distinctive.

“I think of AI in three ways: it can synthesize, edit or generate. As a synthesizer, it's brilliant. As an editor, it's helpful. As a generator, I'm cautious. We all have a voice that comes from our lived experience. If we let AI do the work for us, are we really creating anything at all? And what are we losing when we hand that over?”



Sue Walsh
creative director, SYPartners

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RESEARCH FINDINGS

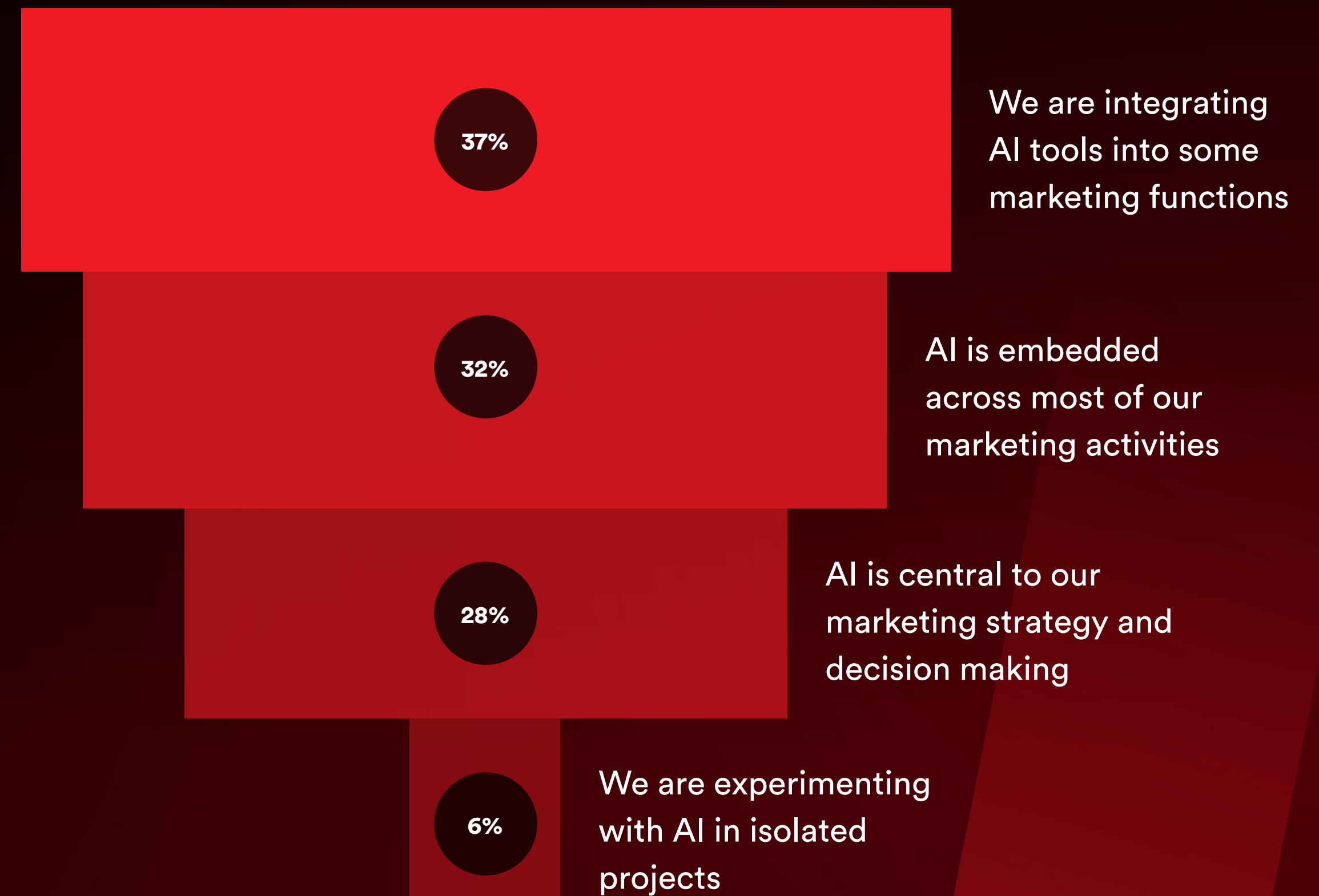
Deep dive

4.1 - ADOPTION

AI has gone from pilot to autopilot

What was once pilot testing is now embedded practice. AI adoption is already advanced and embedded as part of the marketing stack. Together, 94% of marketers are beyond the 'just experimenting' phase.

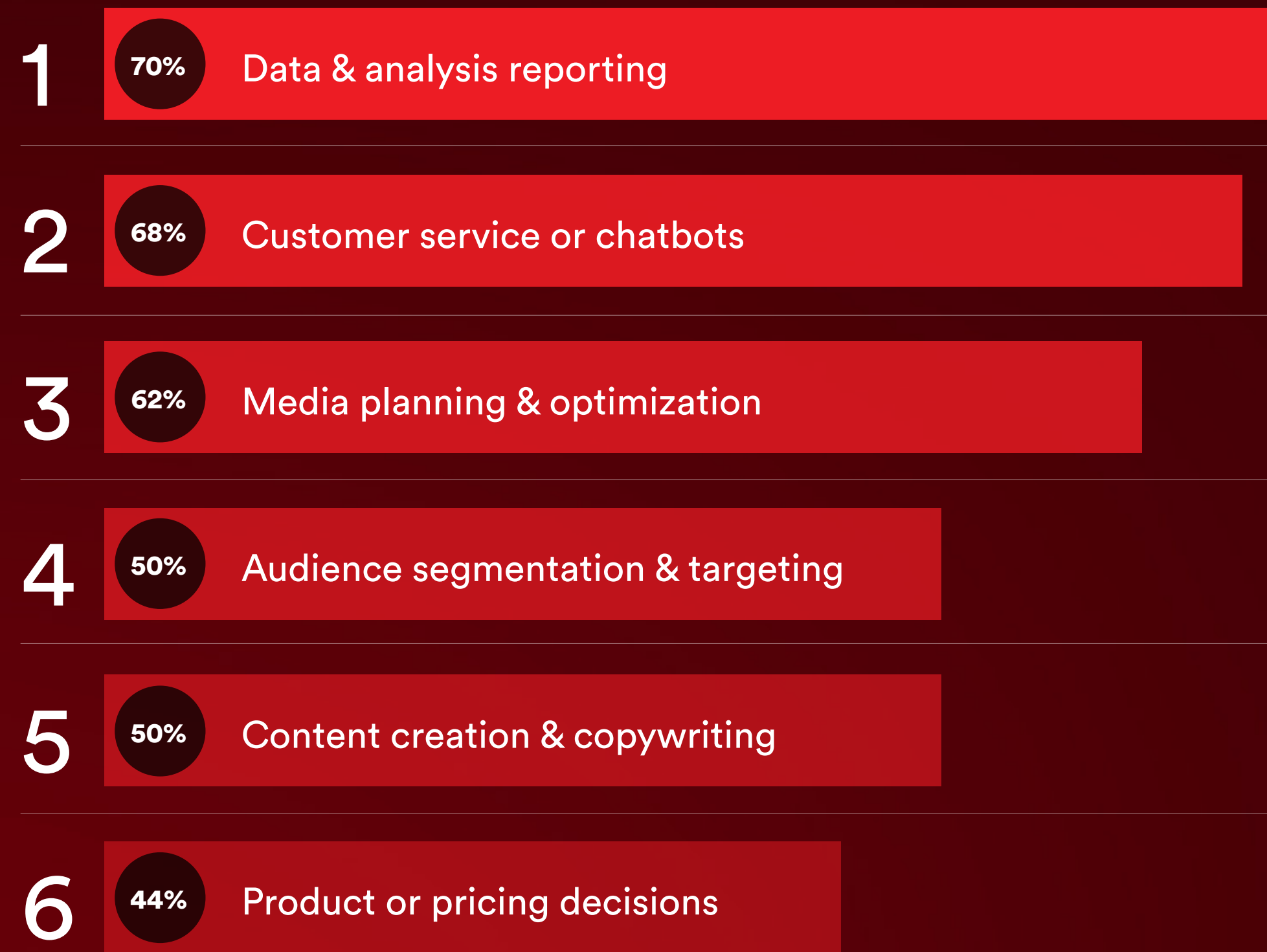
WHICH OF THE FOLLOWING BEST DESCRIBES YOUR ORGANIZATION'S CURRENT USE OF AI IN MARKETING?



4.2 - WHERE AI SHOWS UP

AI's biggest wins are behind the scenes, not in the spotlight

IN WHICH AREAS ARE YOUR MARKETING TEAM CURRENTLY USING AI?



AI's biggest wins are happening behind the scenes. Data analysis (70%), chatbots (68%) and media optimization (62%) lead usage – not content creation or targeting.

Teams remain cautious: brand and legal controls slow approval, creatives push back on “replacement” narratives, and enterprise governance hasn't caught up with real-world use.

And while AI is often linked with targeting, true AI-driven segmentation requires clean first-party data, unified systems and strong governance – all areas where many teams are still wrestling with gaps.

“You can't just throw everything at it and expect it to make sense. You need the right scaffolding, the right foundation. Without that, the outputs are just noise.”



Thomas Kellermann
head of insights, GUT Network

4.3 - CAPABILITY & CONFIDENCE

Confidence is sky-high, but uneven foundations tell another story

Capability and confidence are very high on the surface. This is not a hesitant group; if anything, confidence may be running ahead of governance and risk controls. 96% of CMOs feel capable, yet core gaps in skills and data quality remain unresolved.

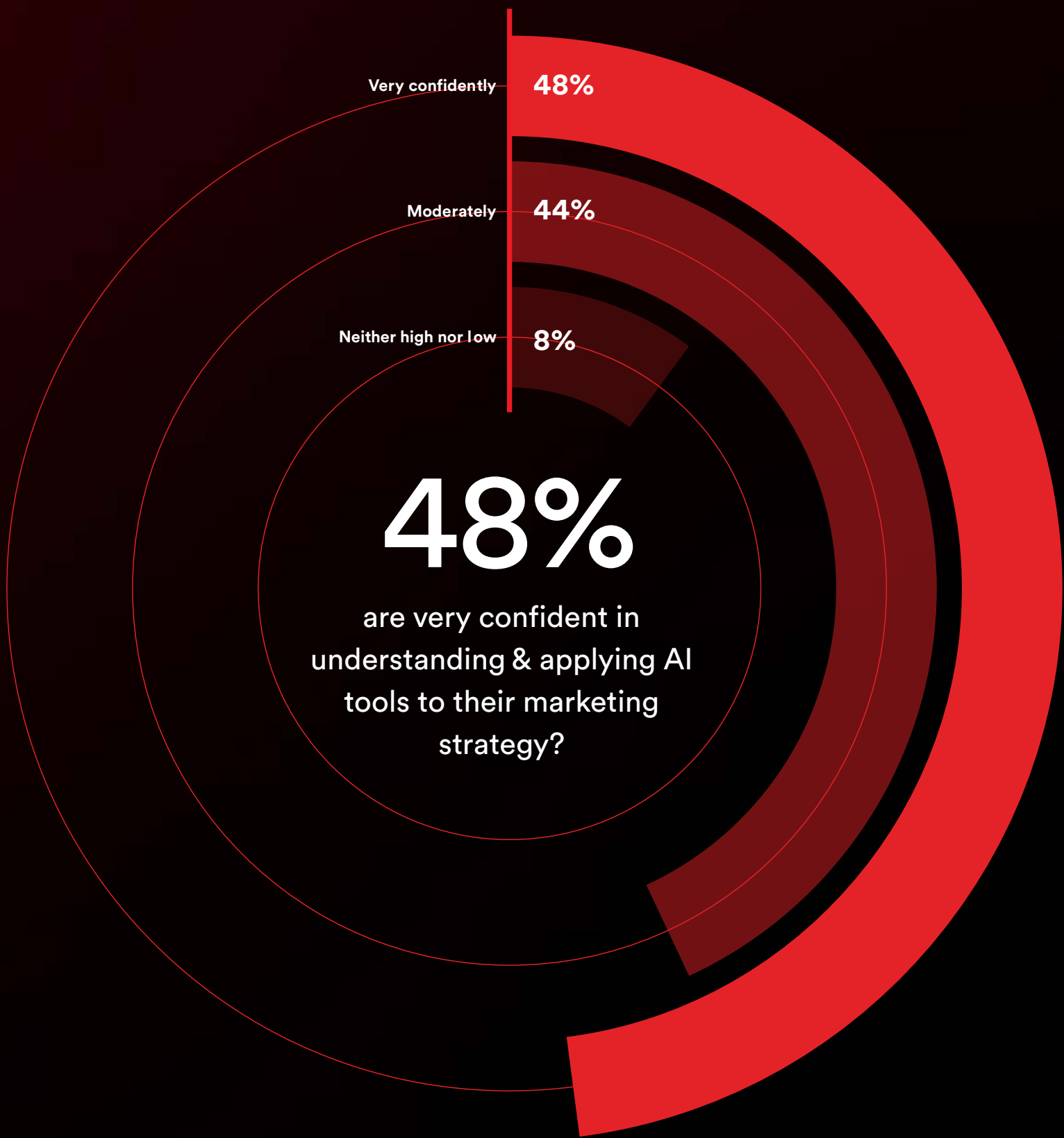
CAPABILITY

How would you rate your team's current capability in AI for marketing?



CONFIDENCE

How confident are you personally in understanding & applying AI tools to your marketing strategy?



4.4 - POLITICS & ETHICS

Marketers have policies – they just don’t have peace of mind

Despite near-universal AI policies, CMOs remain uneasy because the real risks sit outside the paperwork, as ethical concern remains the industry’s quiet tension.

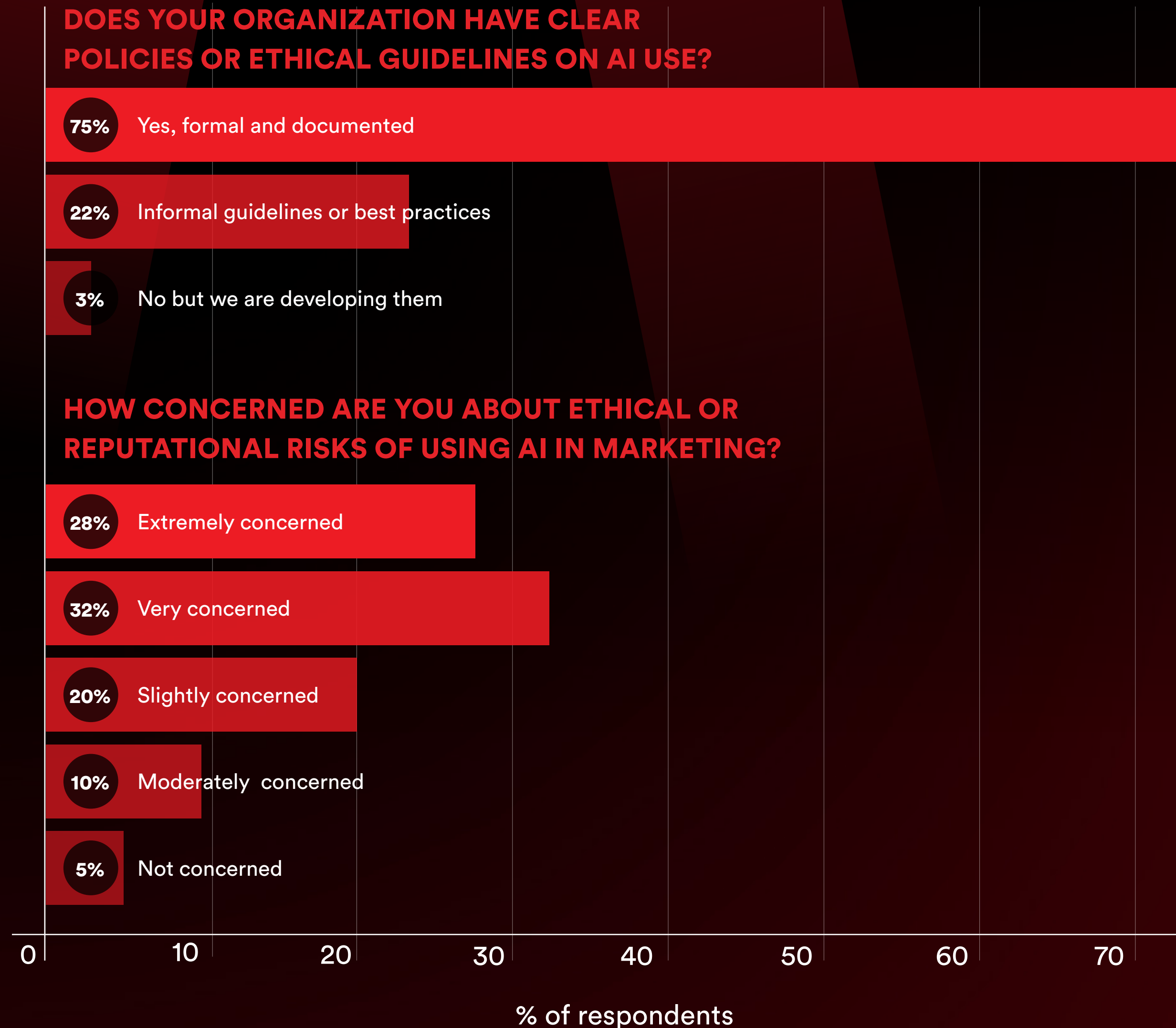
AI evolves faster than governance can keep up, teams don’t always follow the rules, and data exposure remains hard to spot until it’s too late. Ethical pitfalls – bias, authenticity, brand trust – are still emerging, and most policies can’t guide the human judgment calls that matter most.

In short: governance reduces liability, but it doesn’t reduce uncertainty.

“While the way AI makes decisions is game-changing, it is also where things start to get unclear. We are handing over a lot of control to the algorithms, yet there is still a major lack of transparency.”



Teddy Tepavicharova
Programmatic strategy lead at Condé Nast UK



4.5 - IMPACT ON EFFECTIVENESS

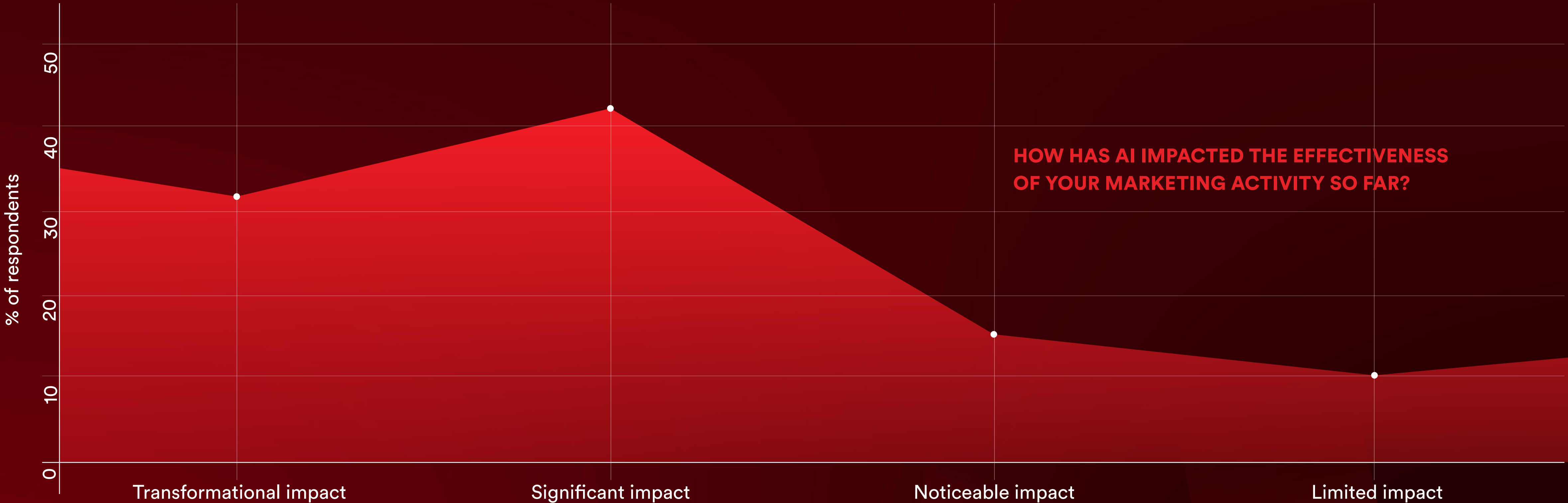
When AI works, it works: 74% report real performance gains

But the biggest uptick is in speed and quality, not necessarily bottom-line growth (yet).

“AI is a game-changer in terms of time efficiency, especially in the pitch phase. It can help you get ideas down quickly and push thinking in interesting directions. But it shouldn’t be trusted with nuance, humor or irony. That’s where human creativity still matters most. The big idea is still a human job.”



Michael Carr
Managing Partner, YOU Agency



WHICH OF THE FOLLOWING OUTCOMES HAVE
YOU EXPERIENCED FROM USING AI?



68%

Improved customer experience



35%

Are seeing cost reduction



70%

Better campaign performance



51%

Increased creative output



68%

Improved efficiency or time saving

4.6 - OUTCOMES FROM AI

AI's value is speed
& consistency – not
cost savings

Time savings (78%) and quality improvements (70%) top the list; cost reduction lags at 36%. So while it might be faster and more efficient in driving better performance, it's not yet necessarily cheaper.

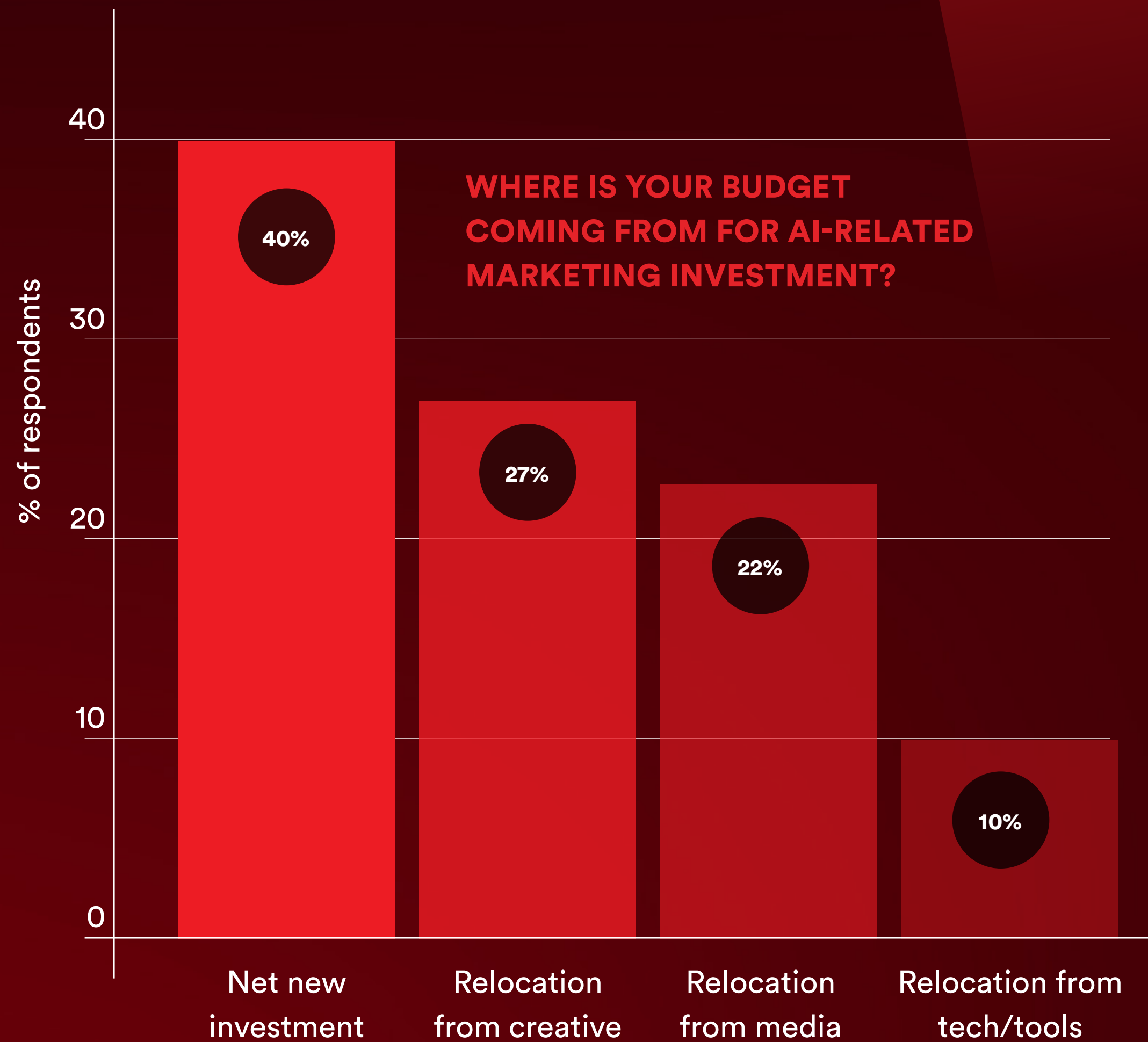
4.7 - INVESTMENT OUTLOOK

Budget increases are universal. Maturity... less so

92% expect to spend more on AI next year – more than half (56%) expecting a ‘significant’ increase – with most (40%) budgets coming from net new investment with less than a third reallocating from existing channels or functions like creative (28%), media (22%) or tech/tools (10%).

It shows that AI is additive not zero-sum – seen as strategically important enough to warrant fresh budget. Boards/finance teams are approving incremental funds rather than asking CMOs to “find it from within” suggesting that AI is being framed as growth-driving, not cost-cutting – a strong indicator of confidence, not cannibalization.

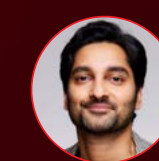




But investment without clarity risks widening the maturity gap. As budgets accelerate, so do the challenges. Without the right skills and human oversight, teams may struggle to absorb an influx of AI tools, leading to inconsistent adoption and poorly governed output.

Governance pressures also rise: policies may exist, but ethical unease persists, and more AI often means more potential for bias, data misuse and reputational exposure. The speed of tool proliferation adds another layer of friction, making it harder for marketers to integrate systems, avoid duplication and maintain quality control. And without strong, connected first-party data, even significant AI investment risks diminishing returns.

“Everyone wants to be first, everyone wants to be fast. But what happens when your outputs start looking the same? If you don’t invest in what sits beneath the AI, you’re essentially outsourcing your brand identity to a tool without thinking about what the tool has been taught.”



Sarang Paraskar
Head of strategy US at GUT Network

4.8 - EVIDENCE FOR INVESTMENT

Quality and speed now beat cost in the investment equation

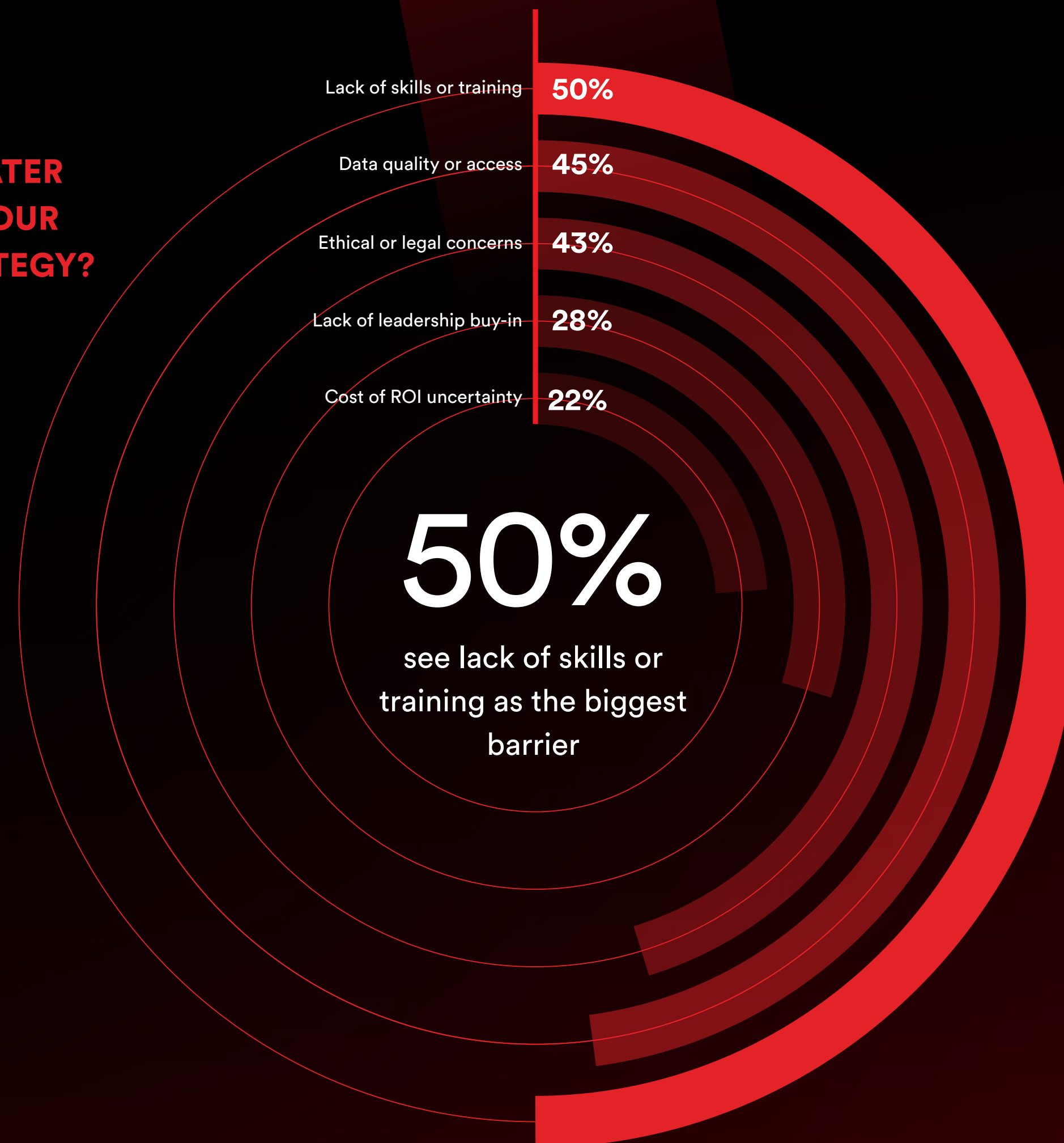
AI is no longer being judged on whether it can cut costs – it's being judged on whether it can improve the work. Marketers are justifying investment through faster production, sharper outputs and more consistent performance, not budget savings.

This marks a shift in mindset: AI is becoming a creative and strategic accelerator rather than an operational efficiency tool. Quality and speed now carry more weight in the business case than the promise of doing things cheaper.

WHAT SIGNALS OR METRICS ARE YOU USING TO JUSTIFY AI INVESTMENT?



WHAT DO YOU SEE
AS THE BIGGEST
BARRIERS TO GREATER
AI ADOPTION IN YOUR
MARKETING STRATEGY?



4.9 BARRIERS

Skills, data, ethics... AI accelerates the same old problems

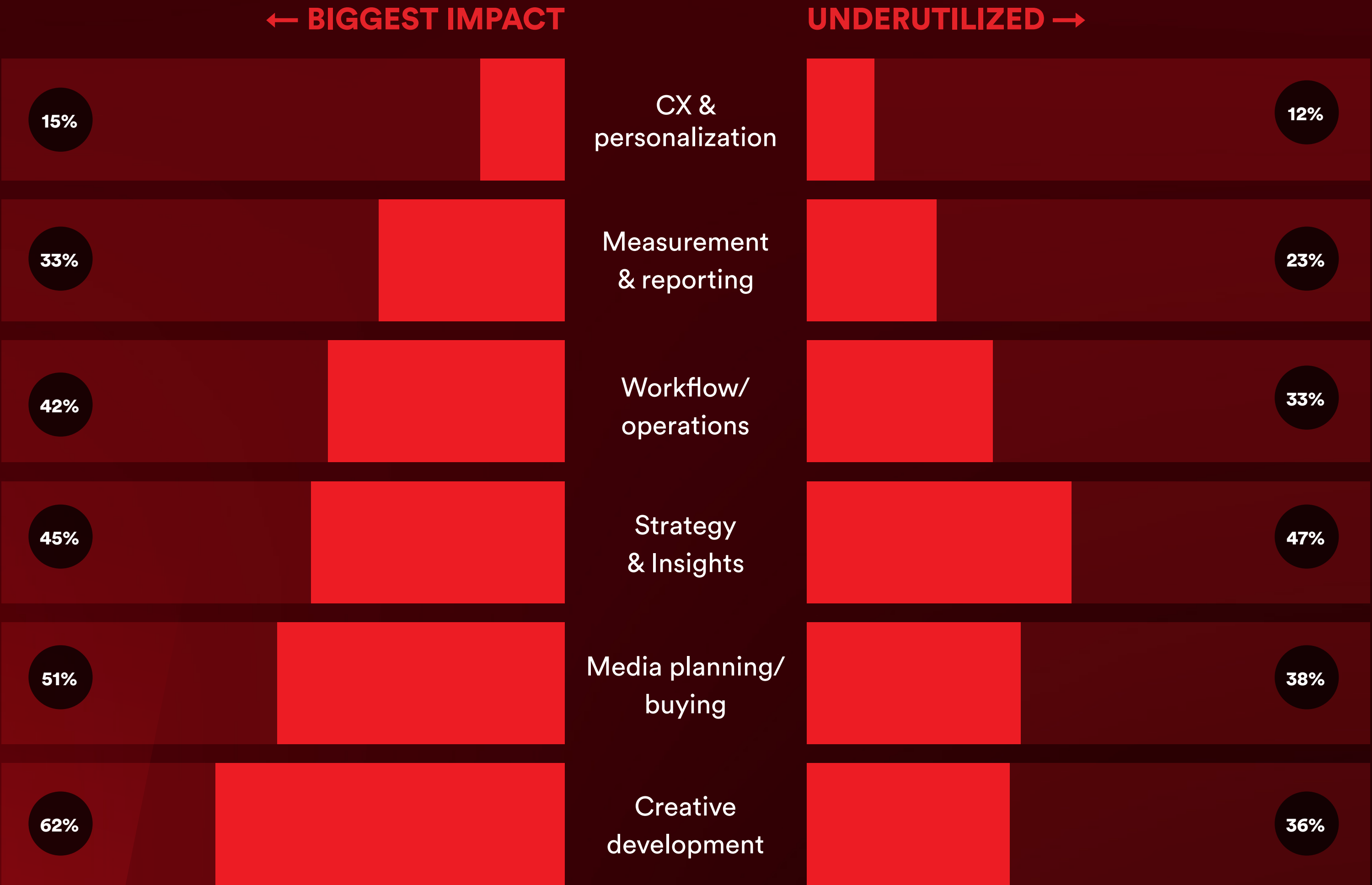
The top blockers aren't new – skills, data, ethics and proof. AI just turns up the volume. But they point to four practical levers marketing teams can pull:

- **Build AI capability:** The biggest gap is skills, suggesting there's a major opportunity for training, playbooks and practical enablement for marketing teams.
- **Fix the data foundations:** With data quality a core barrier, solutions that clean, connect, or activate data will unlock faster AI adoption.
- **Lead with safe, trusted AI:** Ethical/legal concerns create demand for explainable, well-governed, 'responsible AI' frameworks and tools.
- **Unlock leadership confidence:** Clear ROI stories, simple business cases and proven outcomes will help CMOs secure buy-in and scale adoption.

4.10 - IMPACT V UNDERUTILIZATION

The same functions drive today's AI impact & tomorrow's opportunity

Creative and Media lead on impact, but still rank as underutilized, while Strategy & Insights stands out as the biggest untapped area – delivering results today, yet seen by many as not fully realized. That overlap is the maturity gap: AI is working, but it hasn't been scaled or embedded end-to-end.



RECOMMENDATION

What to do next

Wave One reveals a confident, proactive industry – but one still held back by the basics.

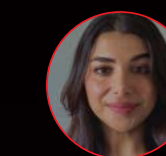
- Confidence is high, but skills gaps are real.
- Policies exist, but concern hasn't disappeared.
- Impact is strong, but foundational capabilities (data/governance) still lag.
- Teams are proactive, but ownership is scattered and fragmented.
- Budgets are rising fast, but business cases lean on speed, not savings.

If Wave One is a baseline, Wave Two will tell us something more important: whether marketers can scale AI maturity as quickly as they scaled AI enthusiasm.

“AI doesn’t win by being smarter, it wins by feeling human. When AI is designed around real customer needs, behaviors and emotions, it stops feeling like a tool and starts feeling like a relationship.

That’s why the future of AI in marketing won’t be defined by technology alone, but by strong CX strategy and design that shape how intelligence shows up in people’s lives.

The brands that get this right won’t just deploy AI faster, they’ll design experiences people actually trust.”



Marwa Khalife
managing director, GUT Marketing Services

Next AI Marketing Pulse coming Q1 2026

If you have views and perspectives to share on the latest AI Marketing Pulse findings or would like to participate in the next wave of the research, get in touch with The Drum team.

[Get involved >](#)

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About GUT Network

GUT is a brave agency for brave clients. A full-service global creative network with offices in Miami, Buenos Aires, Sao Paulo, Toronto, Mexico City, Los Angeles, Amsterdam, Madrid, New York, Singapore, Bogotá and Copenhagen, it's also part of Globant, integrating technology capabilities into everything it does. It believes in Courage, Transparency and Intuition, proud ad nerds obsessed with advertising, marketing and communications. On a mission to inspire the world to follow their gut. Gutsier with Globant.

[More about GUT →](#)

Further reading...

- 1 [You've saved time & money with AI – but have you lost your brand?](#)
- 2 [CMOs can be Captain America – but superhumans need allies too](#)
- 3 [AI won't do your homework: why CMOs can't skip the learning curve](#)