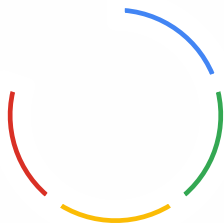




BCG-Google The New Era of Marketing Partnerships

2026 research results and findings



Big questions we needed to answer

Nearly
1,000
respondents

Across
10
countries¹

What do marketers really need now in a landscape disrupted by AI?

Which types of partners are increasingly relevant to marketers and why?

Where are marketers shifting their marketing investments to lean into AI and innovation?

How can agencies and partners grow as the dynamics continue to shift?

Most marketers are looking for partners to operate holistically, but less than half feel they have it

81%



of marketers **want partners to provide integrated capabilities** across creative, media, earned, and commerce

vs

45%



of marketers feel they are **currently integrated** across creative, media, commerce, earned channels

Marketer asks

Integration | Orchestration | Connectivity

Source: Google/BCG, The New Era of Marketing Partnerships: Marketer Survey, January 2026, Global, N=387 Marketers
Q11.How important is it that your primary media agency is able to bring integrated capabilities across creative, media, earned, and commerce?
Score on a scale of 1-7 (where 1=not important at all and 7=very important), incl. scores from 5-7; Q12.Which best describes your current level of integration
across creative, media, commerce, and earned channels, and your desire for more integration with marketing service partners?

There are major disconnects between what marketers and agencies say and do

Marketers

What they **SAY**

81% of marketers “**want integrated capabilities** across paid, owned, earned and commerce”

What they **DO**

Procurement teams still issue **separate RFPs and create fragmentation**

Agencies

What they **SAY**

“We offer **end-to-end orchestration** across your full marketing ecosystem”

What they **DO**

Ground teams are **channel specialists** who've never been in the same room

The basics are basic—innovation drives movement in media budgets

Ranking of channel allocation decision factors now and in the future

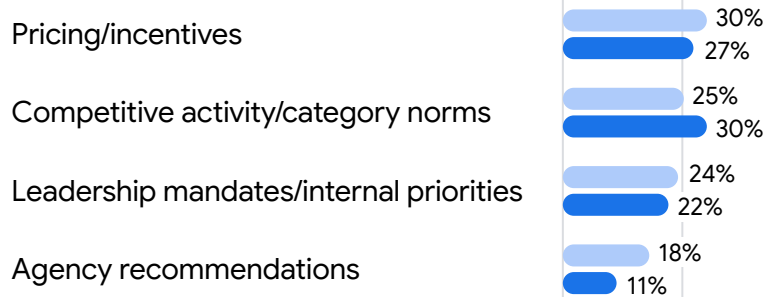
Tablestakes to be in the game



What moves the needle



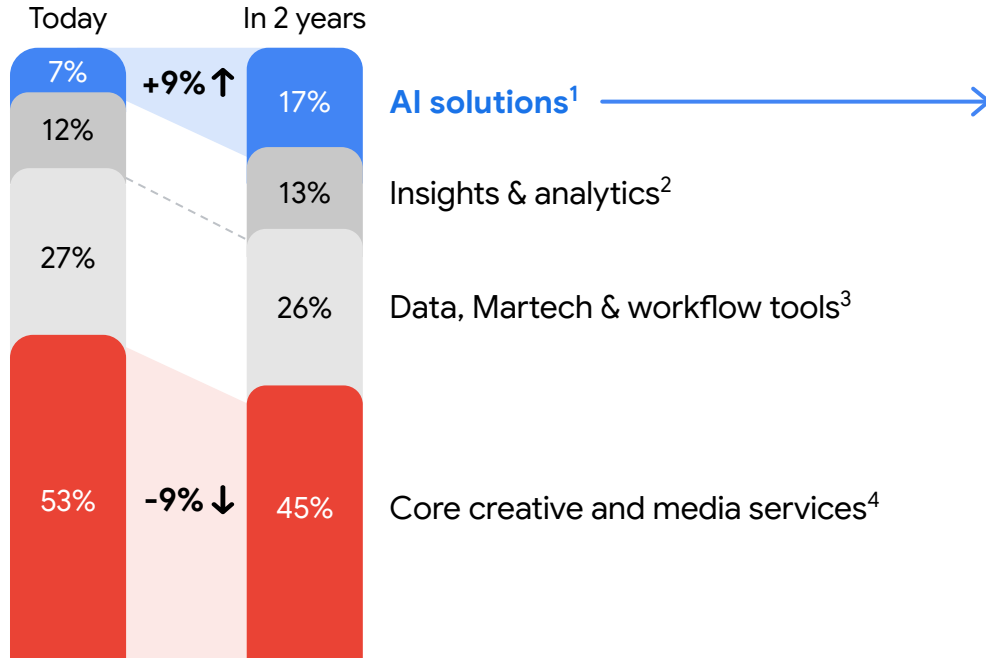
Less consequential factors



Source: Google/BCG, The New Era of Marketing Partnerships: Marketer Survey, January 2026, Global, N=387 Marketers;
Q152 Which of the following factors most heavily influence / do you expect will most heavily influence your channel allocation today/in the next 2 years?

Beyond core agency services, marketers are shifting spend to AI

Marketers' non-working spend by category



Anticipated increases in investments

+86%

AI-driven creative development and production

+84%

AI-driven discovery

+71%

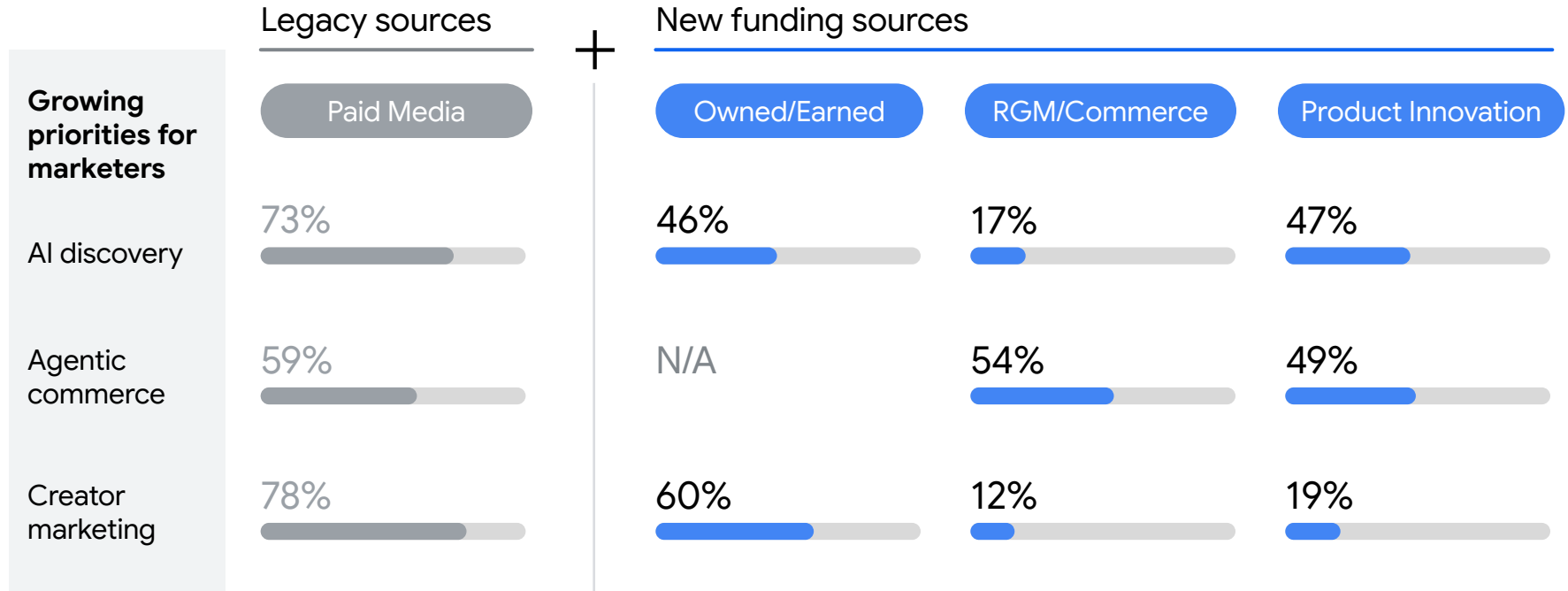
Digital commerce and agentic buying

+55%

Influencer and creator marketing

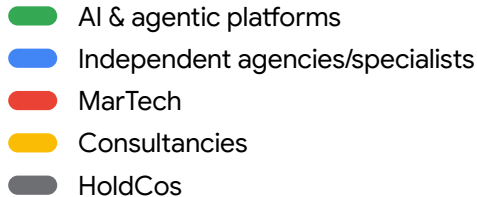
Source: 2026 BCG–Google Marketer Survey (n=387); Q13. Approximately how is your non-working marketing spend allocated today vs. in the next 2 years? 1. AI solutions include systems to autonomously plan & execute marketing workflows (e.g., agentic solutions); 2. Insights & analytics includes services for campaign measurement, reporting, & experimentation (e.g., measurement partners); 3. Data, Martech & workflow tools include data services (data collection, enrichment, modeling, governance, and/or infrastructure), Martech, tools & platforms (platforms to enable, automate or enhance marketing workflows - e.g., creative tools, influencer marketing platforms); 4. Core services include media planning & buying, creative services, and specialty services (niche, high-expertise marketing services - e.g., influencer marketing)

Paid media is not the only source of budget that is funding increasing areas of marketer investment



Source: Google/BCG, The New Era of Marketing Partnerships: Marketer Survey, January 2026, Global, N=387 Marketers; Q28. As your organization pursues new marketing approaches in <budget>, where does the budget typically come from? Select up to top 3; percentages represent share of marketers who indicate budgets come from at least one 7 budget source within each category. RGM = revenue growth management.

New types of partners are taking share, disrupting the landscape as marketers' needs change



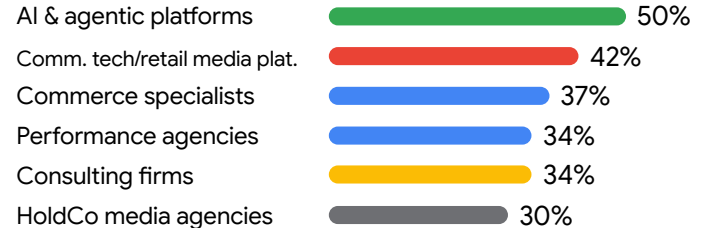
AI-driven creative dev. & production



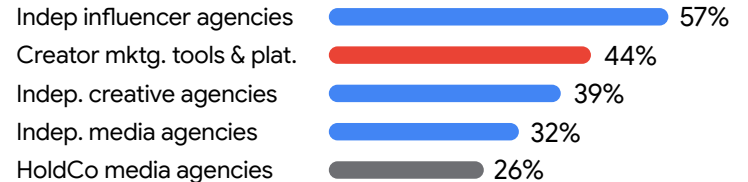
AI-driven discovery



Digital commerce & agentic buying



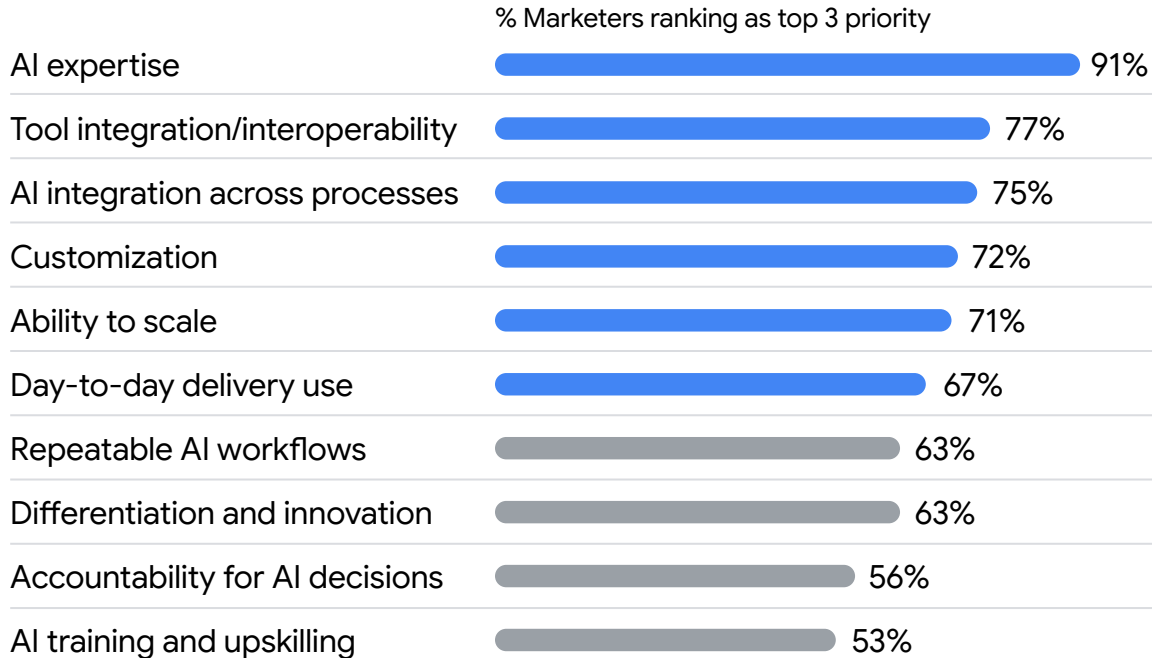
Influencer & creator marketing



Source: Google/BCG, The New Era of Marketing Partnerships: Marketer Survey, January 2026, Global, N=387 Marketers
 Q31.Which partner types would you consider supporting you with [area]? Select all that apply

Marketers are willing to increase spend and clear on what they want

Top priorities for AI maturity from marketers

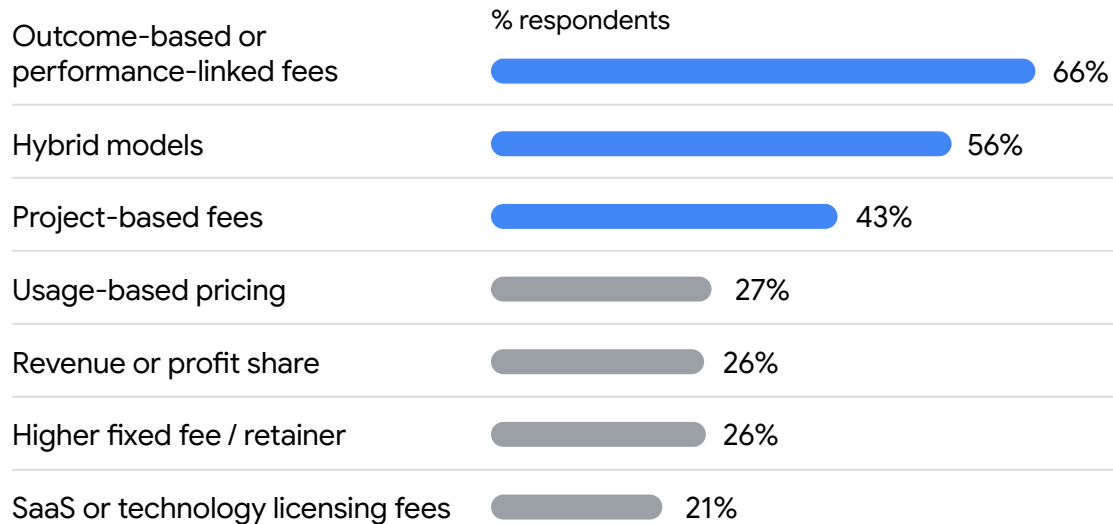


97%

of marketers indicate they would **increase spend** with a partner who delivers across new opportunity spaces¹

Marketers now want to capture and share value in new ways with partners, so new commercials are being explored

Marketers are looking for new compensation models



The reality is outcome-based models can be challenging

Measurement and transparency

Margin pressure

Client risk tolerance

Source: Google/BCG, The New Era of Marketing Partnerships: Marketer Survey, January 2026, Global, N=387 Marketers

1. Percentages in highlighted box are significantly different from responses outside of highlights; Q34.How would you prefer to compensate a marketing services partner for delivering the top expansion opportunities you rated? Rank top 3; 2025-2026 Agency interviews & customer calls

The marketer mandate is clear: **holistic thinking**



Building stronger internal partnerships to connect across silos

Deepening external partnerships to integrate with agencies, media, and tech partners

Designing new human-to-agentic partnerships to accelerate the impact of AI

Where agencies and partners can win

01.

Build connectivity between specialized capabilities (within your company and beyond) in service of the marketers' holistic business outcomes

02.

Innovate to take internal walls and friction out of your operating model and serve clients more seamlessly

03.

Explore flexible delivery models and commercial structures with deeper alignment to performance and outcome, where appropriate

04.

Focus on the expansionary thesis, looking beyond paid media for new value pools

Thank you!

Google + BCG