

Marketing in Digital Transformation: Efficiency, Automation & Competition

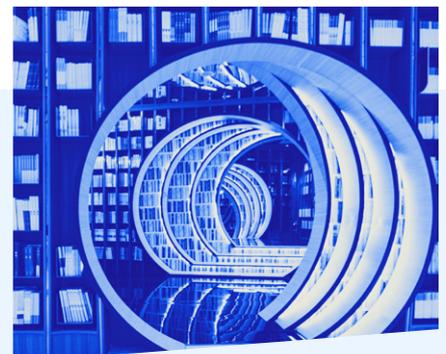
Marketing Practices in
German Companies – 2026 Study

Marketing in Digital Transformation: Efficiency, Automation & Competition

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Executive Summary

Marketing is undergoing a structural transformation. Companies in the digital sector operate in an environment with increasing demands for impact, efficiency, and control, while budgets remain largely stable. This study shows how marketing organisations manage this tension, what priorities they set, and what role digitalisation, automation, and regulation play.

The study examines marketing practices in companies from a microeconomic perspective. The focus is on the use of marketing budgets, the prioritisation of measures, and the organisational and structural framework conditions under which marketing is managed today. It is based on an online survey of 180 companies from the digital industry in Germany, conducted between calendar week 44 and week 50 in 2025. The results are not representative, but they highlight key trends and structural tensions in current marketing practice.

Key Findings:

- **Marketing Budgets Are Stable, Priorities Are Shifting**
Marketing budgets remain stable at an average of 4.1 percent of revenue. The transformation of marketing is less driven by increasing budget shares and more by efficiency gains, automation, and data-driven scaling.
- **Growth and Relationship Management Shape Marketing Objectives**
Marketing clearly focuses on business-relevant goals. For the vast majority of companies, acquiring new customers (91 percent), customer retention (89 percent), and building trust (87 percent) are key priorities.
- **Digital and Data-Driven Measures Shape Everyday Marketing**
CRM marketing (72 percent), social media marketing (62 percent), and event marketing (60 percent) are the most commonly used marketing tools. At the same time, there is a growing shift towards integrated, data-driven approaches, while event marketing continues to account for the largest share of the marketing budget.
- **Automation and AI Are Becoming Significantly More Important**
76 percent expect marketing automation to become more important. At the same time, 35 percent identify a lack of AI strategy, and 34 percent cite insufficient integration of AI as an internal challenge. 84 percent consider AI the most important influencing factor for marketing in Germany.
- **Cost Pressure and Resource Constraints Are Burdening Marketing Organisations**
54 percent each cite cost pressure and the automation of marketing processes as the most significant internal challenges. 43 percent see an increasing need for resources for content creation, and 38 percent for managing social media activities.
- **Regulation and Data Protection as Ambivalent Framework Conditions**
54 percent see data protection requirements and regulation as the most significant external challenges. At the same time, 64 percent see data protection as contributing to stronger brand trust.

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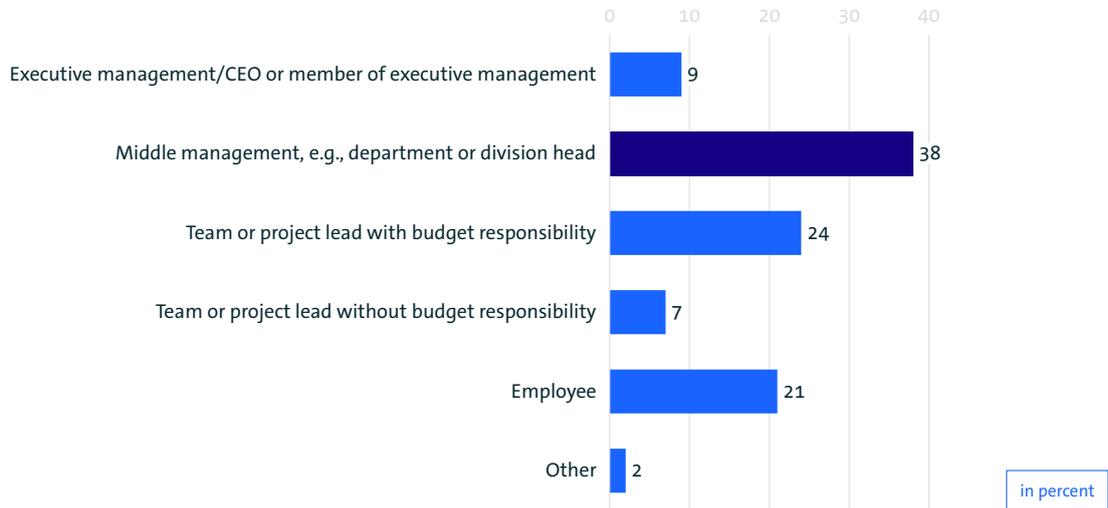
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Database

Database

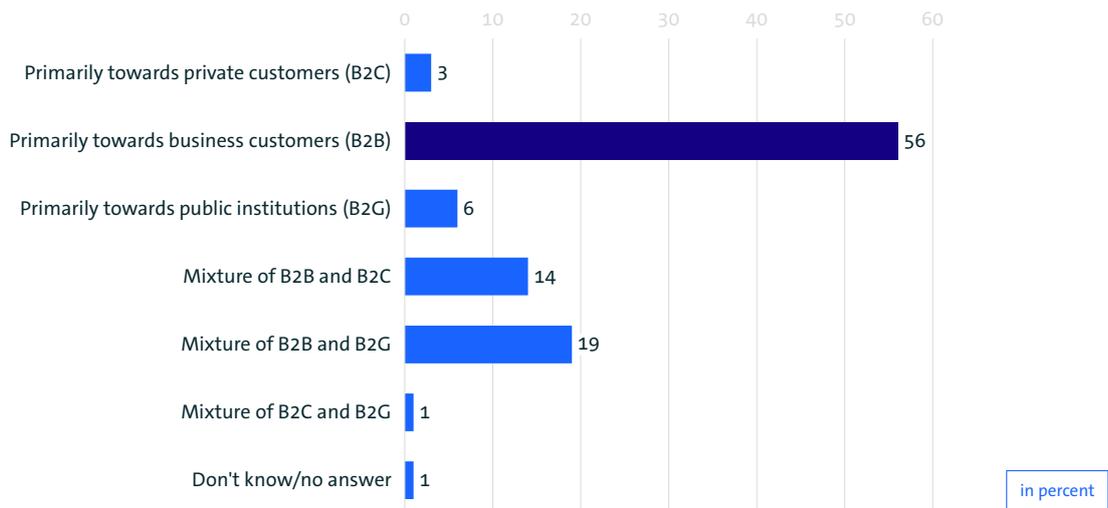
What position do you hold in your company?



Base: All surveyed companies (n=180) | Deviations from 100 percent are due to rounding | Source: Bitkom Research

Figure 1: Position in the company

To whom is your company's business model primarily targeted?

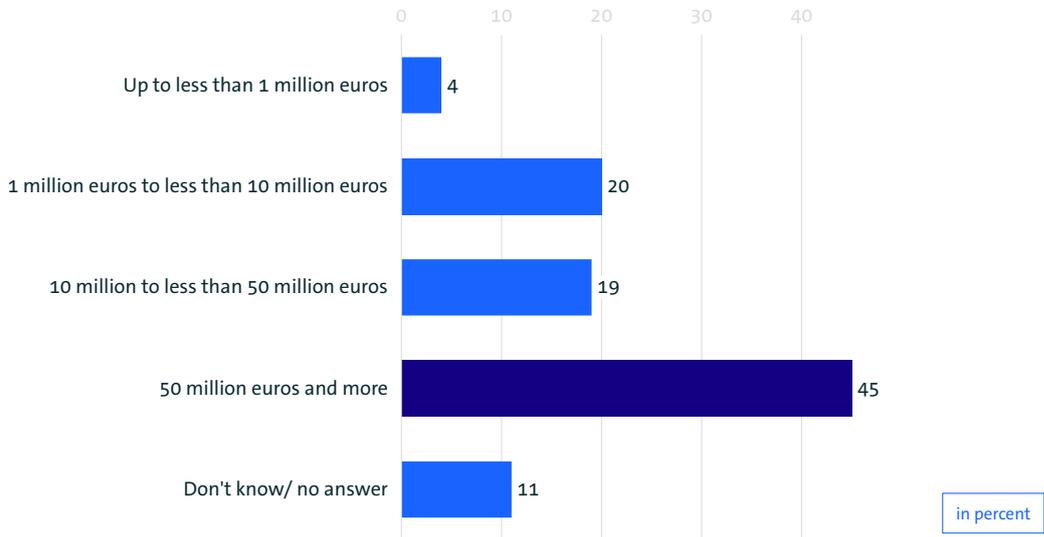


Base: All surveyed companies (n=180) | Deviations from 100 percent are due to rounding | Source: Bitkom Research

Figure 2: Business model

Database

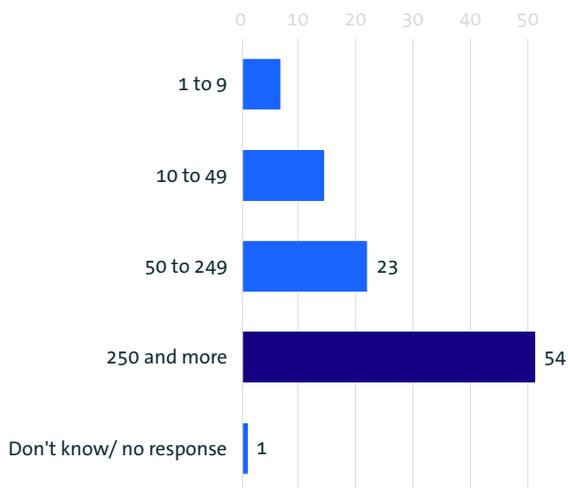
Into which revenue size class did your company fall in the current fiscal year across all locations in Germany? This refers to total annual revenue.



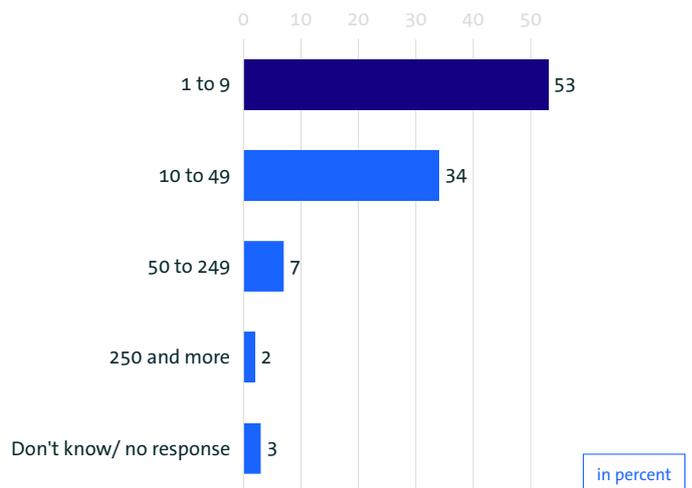
Base: All surveyed companies (n=180) | Deviations from 100 percent are due to rounding | Source: Bitkom Research

Figure 3: Revenue Size Class

Number of employees



Employees in the "Marketing" sector



Base: All surveyed companies (n=180) | Deviations from 100 percent are due to rounding | Source: Bitkom Research

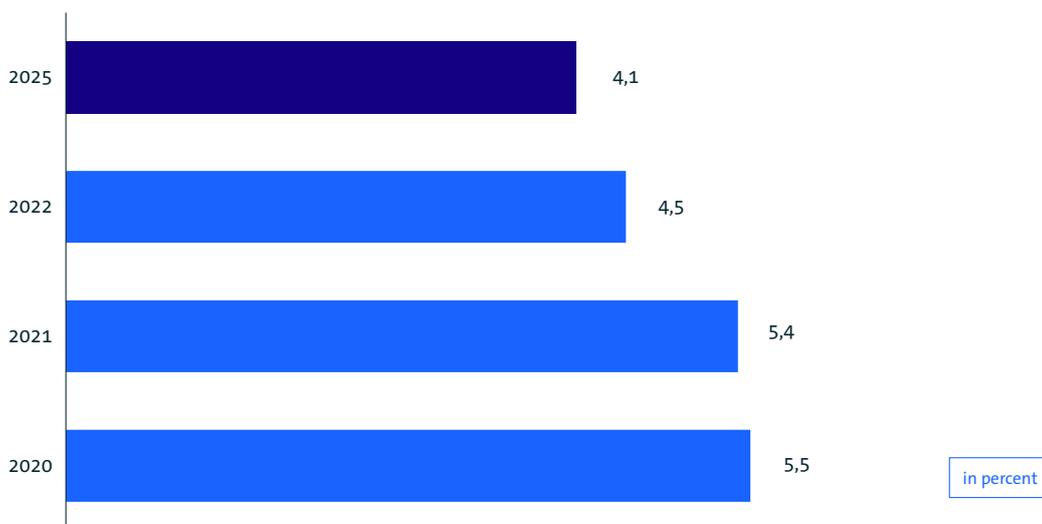
Figure 4: Number of employees and number of employees in marketing

1 Importance of Marketing Within the Company

1 Importance of Marketing Within the Company

1.1 Marketing Budget as a Share of Revenue

What is the total marketing budget in relation to your company's revenue?



Basis: All surveyed companies (n=180) | Source: Bitkom Research

Figure 5: Average marketing budget as a share of company revenue

Companies' marketing budgets remain largely stable relative to revenue. At an average of 4.1 percent of revenue, the long-observed trend of marketing budgets not expanding proportionally with company revenue continues.

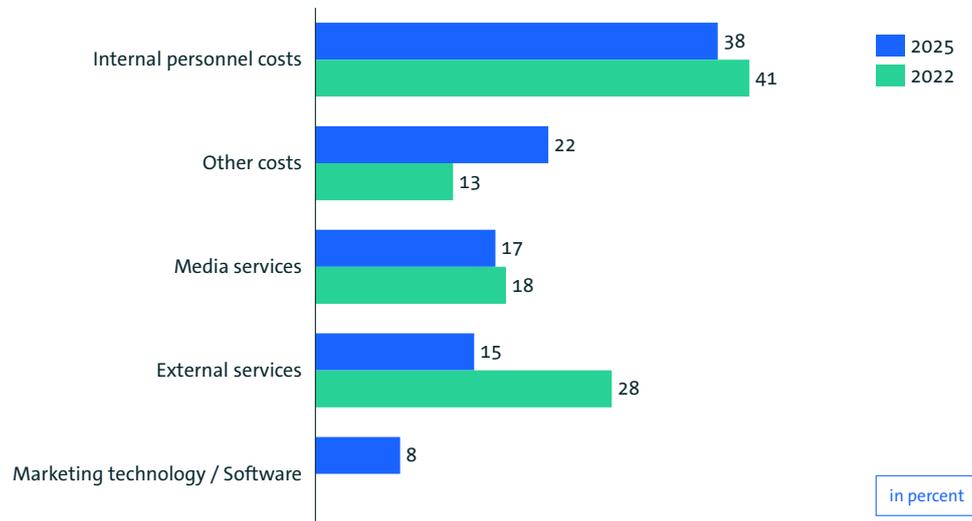
This stability points to a changing role for marketing: In a challenging economic environment, marketing resources are managed less through higher budget shares and more through targeted allocation. Efficiency, prioritisation, and scaling are becoming increasingly important, particularly through the growing use of digital technologies and automation. At the same time, the digital marketing market in Germany continues to grow in overall volume.

The transformation of marketing is therefore primarily taking place through changes in resource allocation and new ways of working, rather than through increasing budget shares at the company level. Marketing is increasingly understood as a strategic instrument for securing market positions and strengthening competitiveness.

The largest stated share of companies allocates between 1 and 3 percent of revenue to marketing. However, it is noteworthy that a significant proportion of companies cannot or do not wish to disclose this information. This indicates that budget transparency and allocation remain structural challenges for many organisations. Instead of higher marketing budgets, the strategic prioritisation of existing resources is becoming increasingly important.

1.2 Marketing Budget by Cost Types

How is your company's total marketing budget distributed across the following types of costs in percent?



Base: All surveyed companies (n=180) | Average values in percent | Not shown: "Don't know/no answer" | Source: Bitkom Research

Figure 6: Distribution of the marketing budget across various cost types in the years 2022 and 2025

The distribution of marketing costs shows a significant shift within marketing organisations: Internal personnel costs still represent the largest cost category (38 percent), while expenses for external services have declined (15 percent in 2025). This indicates that companies are increasingly building marketing capabilities in-house and bringing tasks back into internal structures over the long term.

At the same time, a significant increase can be observed in the category «Other Costs,” which accounts for 22 percent. This development points to growing expenses beyond traditional measures, such as data protection and compliance requirements, internal process adjustments, investments in

data infrastructure and data quality, training, as well as project-related services at the interfaces with IT, sales, or product development.

Structural Change in Marketing

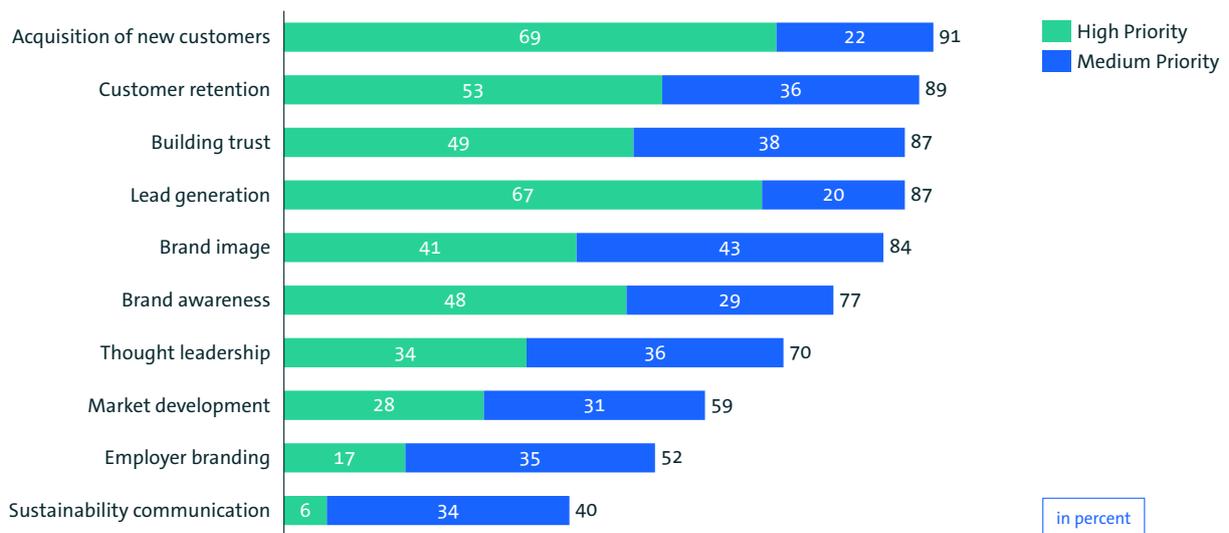
Marketing is increasingly moving beyond a purely campaign-driven logic and becoming a continuous, data-driven function that closely collaborates with other areas of the company.

2 Strategic Alignment & Marketing Measures

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2.1 Priorities of Marketing Objectives

What priority do the following marketing goals currently have for your company?



Basis: All surveyed companies (n=180) | Data for "High Priority" and "Medium Priority" | Source: Bitkom Research

Figure 7: Priorities of Different Marketing Goals

The prioritisation of objectives clearly emphasises a results-oriented approach to marketing. The primary focus is on directly business-relevant goals, such as acquiring new customers (91 percent) and strengthening existing customer relationships (89 percent). In addition, building trust is becoming increasingly important (87 percent) and highlights the role of marketing as an interface between market engagement and long-term customer relationships.

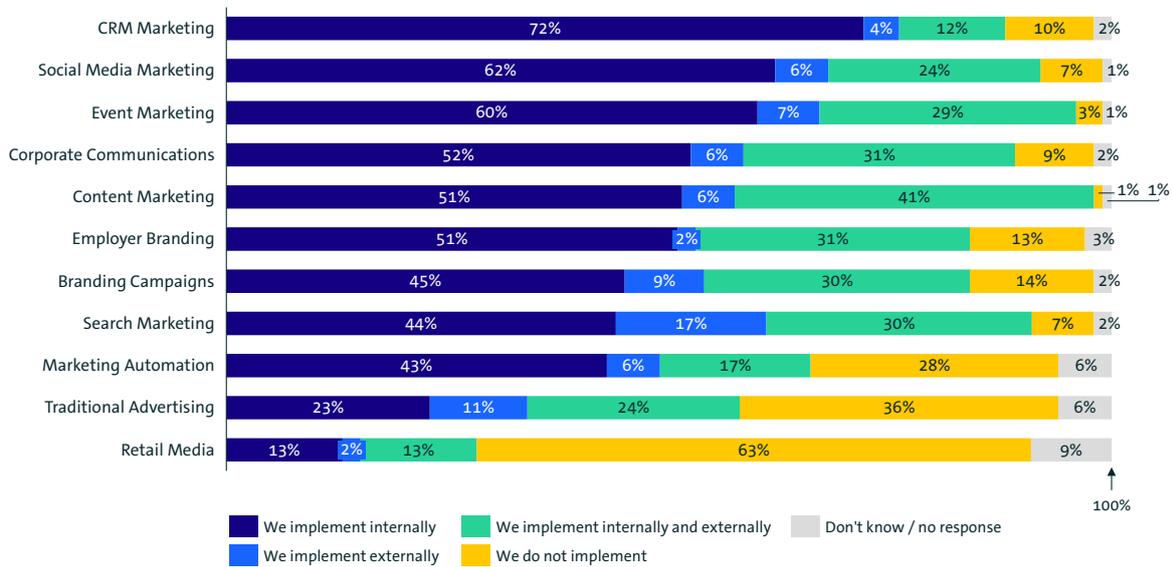
Image- and reputation-related goals remain relevant but play a more secondary role. Sustainability communication is significantly less frequently prioritised as an independent marketing objective.

Marketing as an Operational Function

Marketing objectives are increasingly aligned with measurable contributions to market growth and customer development. Long-term and communication-related goals remain relevant but take a secondary role compared with operational priorities.

2.2 Implemented Marketing Measures

What marketing measures are currently being implemented in your company?



Basis: All surveyed companies (n=180) | Deviations from 100 percent are due to rounding | Source: Bitkom Research

Figure 8: Implementation of various marketing measures (internal/external)

The implemented marketing measures show how companies translate their strategic objectives into practical action. Particularly common are measures that can be continuously integrated into existing customer and communication processes. CRM marketing is implemented internally by 72 percent of companies, social media marketing by 62 percent, and event marketing by 60 percent. Corporate communication (52 percent) and content marketing (51 percent) are also implemented internally by around half of the companies.

What stands out is the generally high level of internal implementation across almost all measures. Marketing is therefore primarily organised as an ongoing operational function within companies, rather than being understood mainly as sporadic campaign-based work.

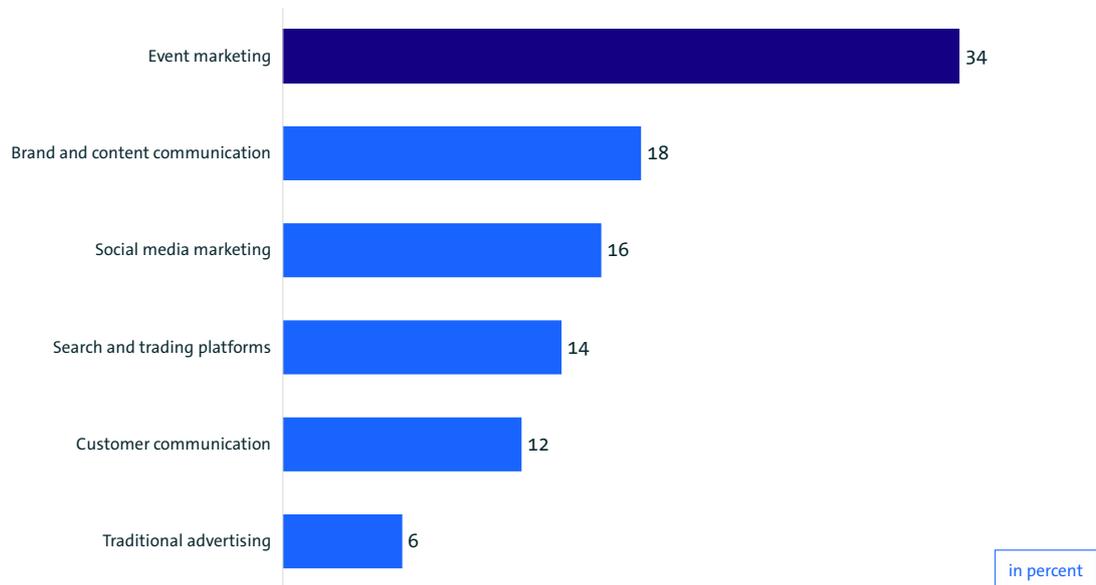
External support remains relevant, but is used more selectively, for instance in search engine marketing or marketing automation, where internal and external implementation are often combined.

Dialogue Over Reach

Marketing measures are increasingly used where direct customer interaction, relationship building, and measurable impact are possible. Broad-reaching but less targeted formats are becoming less central.

2.3 Distribution of the Marketing Budget Across Specific Measures

How is your company's marketing budget distributed across marketing activities?



Base: All surveyed companies (n=180) | Average values in percent | Not shown: "Don't know/no response" | Source: Bitkom Research

Figure 9: Distribution of the marketing budget across various marketing activities

The budget allocation reveals a clear focus on key marketing activities. Event marketing accounts for 34 percent of the marketing budget, highlighting the continued importance of personal interaction and direct customer engagement.

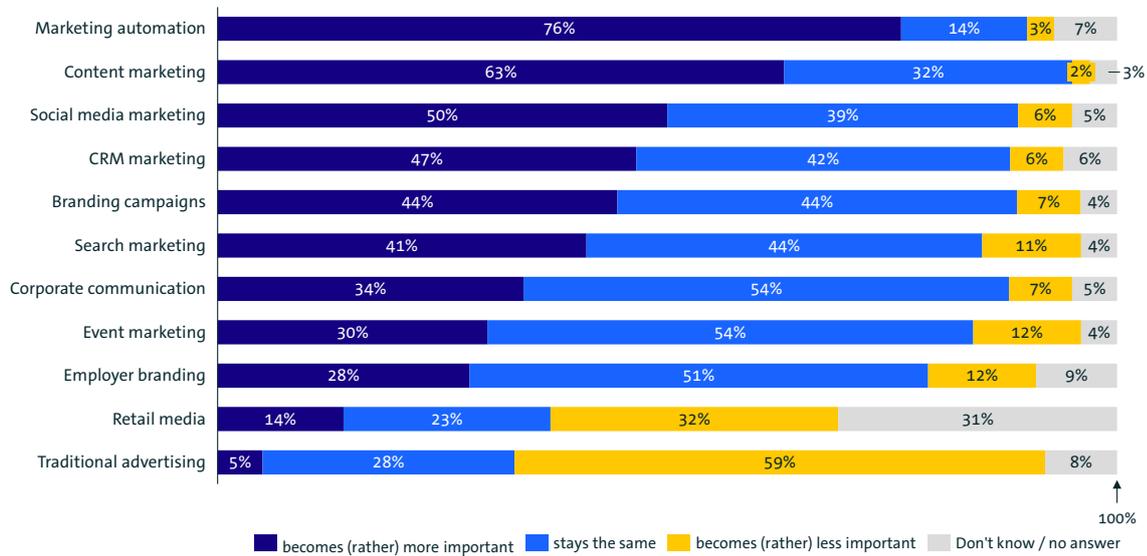
Digital measures such as online marketing and social media also account for substantial shares of the budget, complementing physical formats with scalable, continuous, and comparatively cost-efficient touchpoints. The budget allocation therefore reflects less of an either-or approach and more a deliberate combination of resource-intensive in-person formats and scalable digital channels along the customer journey.

Physical and Digital Considered Together

Marketing budgets reflect the interplay between digital channels and personal formats: While digital measures enable scalable reach and efficiency, physical formats are used strategically to deepen customer relationships.

2.4 Future Relevance of Marketing Measures

How do you expect the relevance of marketing measures for your company to change?



Base: All surveyed companies (n=180) | Deviations from 100 percent are due to rounding | Source: Bitkom Research

Figure 10: Expected development of the relevance of marketing measures

Looking ahead reveals a clear shift towards more data- and technology-driven marketing approaches. In particular, marketing automation is gaining significant importance: 76 percent of companies expect it to become more important in the future. Content marketing (63 percent) and social media marketing (50 percent) are also expected by the majority of companies to increase in importance.

At the same time, established measures continue to maintain a high level of relevance. CRM marketing is considered likely to become more important in the future by 47 percent of companies, and content marketing and social media continue to provide a stable foundation for marketing activities. Physical formats such as event marketing remain relevant for many (30 percent expect their importance to increase), but

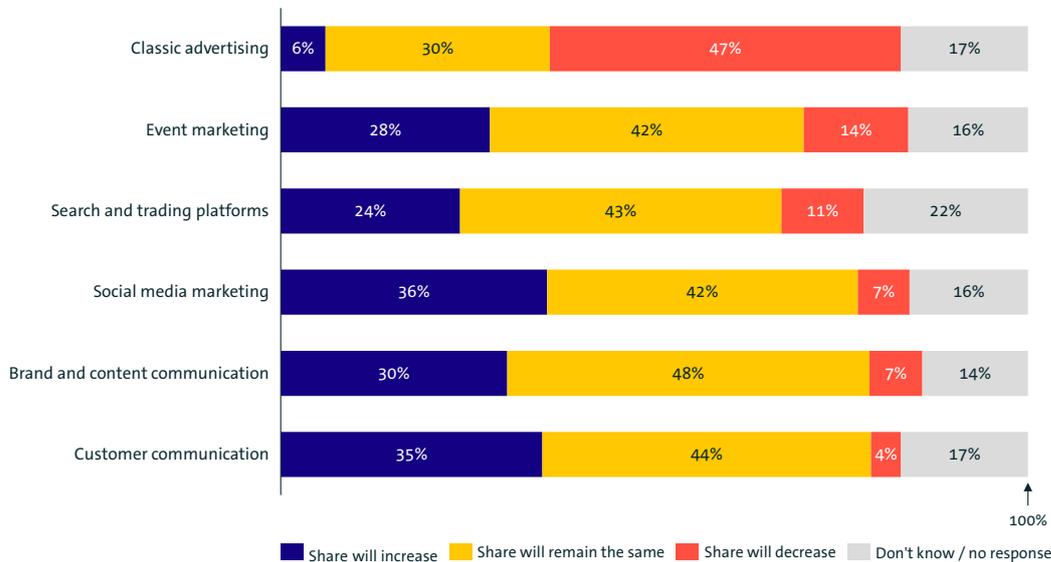
overall they are losing relative importance and are increasingly being integrated into digital customer journeys.

Efficiency as a Future Success Factor

The future significance of marketing measures will be determined less by the emergence of new channels and more by the level of automation and integration. Technology will become the central lever for increasing impact, scalability, and efficiency.

2.5 Future Budget Allocation for Marketing Activities

How will the budget share for marketing measures develop?



Base: All surveyed companies (n=180) | Deviations from 100 percent are due to rounding | Source: Bitkom Research

Figure 11: Expected development of the budget share for marketing activities

Expectations for future budget allocation are largely stable overall. For key marketing activities such as brand and content communication as well as social media marketing, around 42 to 48 percent of companies expect budget shares to remain unchanged, with only a few expecting significant shifts. At the same time, a shift in the relative importance of individual measures is emerging within these stable budget frameworks—investments are gradually moving away from traditional, comparatively costly advertising formats towards digital and online channels that offer scalable reach, targeted engagement, and greater controllability.

While budget shares remain largely constant, the demands on marketing continue to increase: more channels, more content, and greater personalisation. At the same time, rising costs, scarce personnel resources, and regulatory require-

ments make the implementation of data-driven approaches more challenging. Marketing is therefore facing less of a pure budget constraint and more the challenge of achieving more with existing resources.

More Demands, Limited Leeway

Marketing budgets remain largely stable, while activities are increasingly shifting towards digital and scalable channels. The central challenge is to balance rising expectations regarding impact, content, and personalisation with limited financial and human resources, as well as increasing regulatory requirements.

Digital Fairness Act: "Unfair Personalization Practices"

Personalisation is a central component of modern marketing strategies. It enables more relevant and individually perceived communication, more efficient processes, and an improved customer experience. With increasing automation and the use of artificial intelligence, personalised communication is gaining further importance. At the same time, personalisation is increasingly becoming the focus of regulatory debates at the European level. Within the framework of the planned Digital Fairness Act (DFA), the European Commission is discussing, among other things, so-called "unfair personalisation practices."

Personalisation: Already Clearly Regulated

From Bitkom's perspective, it is important to note that personalised marketing measures are already subject to clear legal requirements. Data protection regulations—particularly the provisions of the GDPR—clearly define the conditions under which personal data may be processed. What is crucial is not personalisation itself, but how it is implemented in practice. When properly implemented, personalisation is compatible with data protection and fairness requirements.

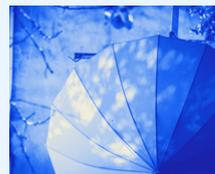
Technology as an Enabler for Privacy-Compliant Personalisation

Technological developments are creating new opportunities to implement personalisation in a data-efficient and regulation-compliant way. This includes, in particular, decentralised and data-minimising approaches, such as edge processing.

Automation and AI can therefore not only enable efficiency gains but also support the more effective implementation of data protection requirements.

Connection to the Study Results

The results of this study show that marketing automation and data-driven measures will continue to gain importance in the future. In this context, a differentiated regulatory approach is essential: blanket restrictions on personalised approaches could limit innovation potential and undermine efficiency gains in marketing.



↗ Position Paper

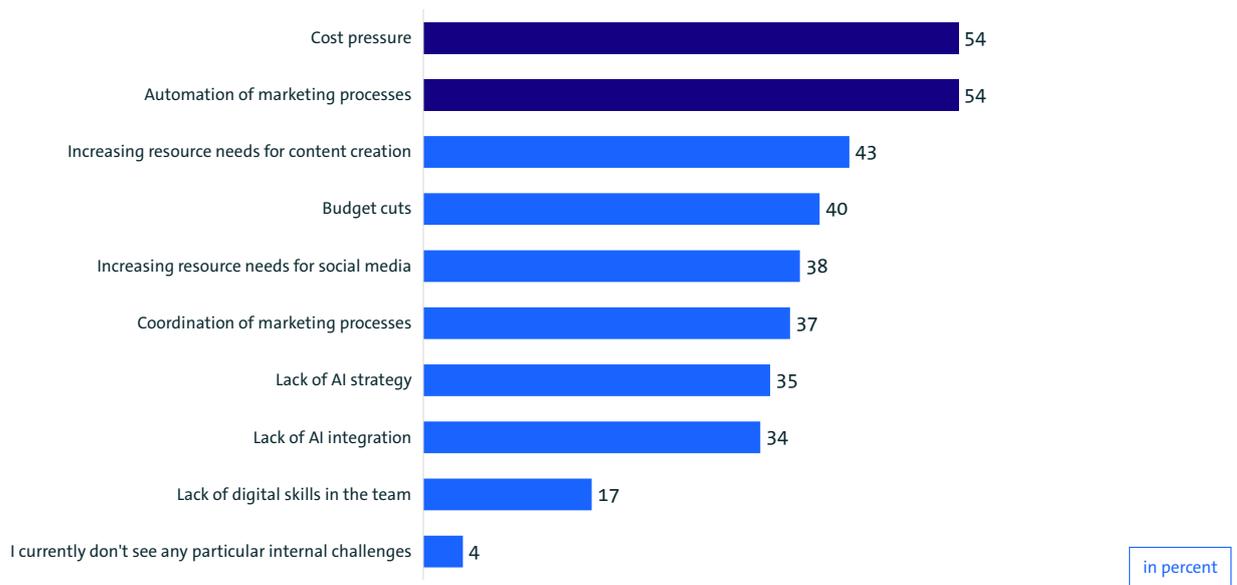
"Digital Fairness Act"

3 Internal & External Challenges

3 Internal & External Challenges

3.1 Current Internal Challenges in Marketing

What internal challenges do you currently see for your company's marketing?



Basis: All surveyed companies (n=180) | Multiple responses possible | Source: Bitkom Research

Figure 12: Internal challenges for marketing

Internal challenges in marketing are primarily shaped by pressure to increase efficiency and deliver results. Cost pressure and the automation of marketing processes are mentioned as central challenges by 54 percent of companies. At the same time, operational effort is increasing: content creation and the management of social media channels in particular are becoming increasingly resource-intensive. There are also structural issues such as budget cuts and the coordination of increasingly complex marketing processes.

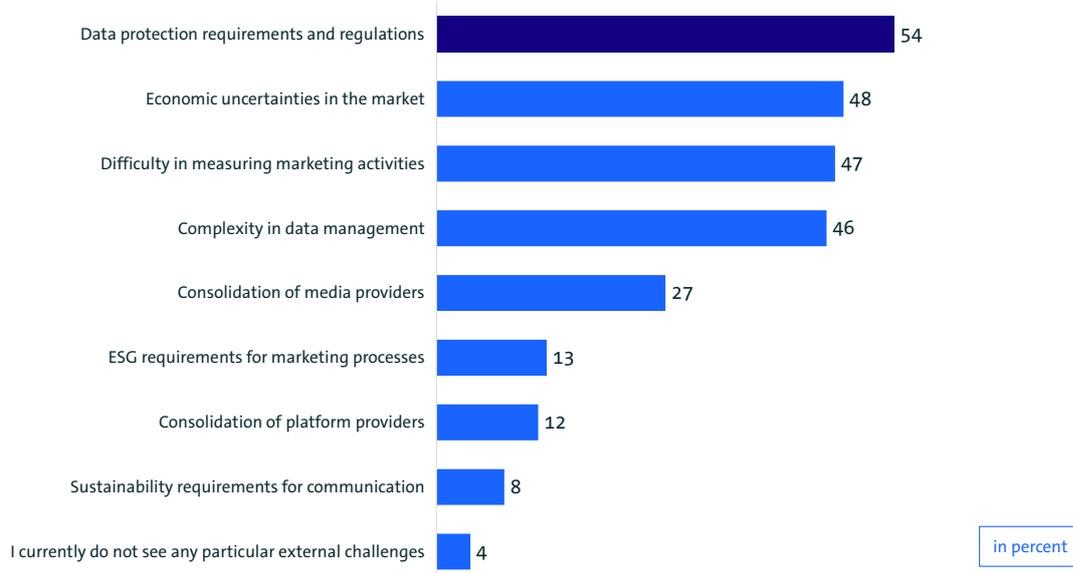
A further notable finding is the gap between ambition and practical implementation in the use of new technologies. Many companies see automation and AI as necessary levers but have not yet developed clear strategies or achieved sufficient integration into existing processes.

Efficiency as a Permanent Task

Marketing faces the ongoing challenge of meeting increasing demands with limited resources. Automation and AI are seen as key solutions—but at the same time they present their own internal implementation challenges.

3.2 Current External Challenges in Marketing

What external market and technology challenges is your industry's marketing currently facing?



Basis: All surveyed companies (n=180) | Multiple answers possible | Source: Bitkom Research

Figure 13: External market and technology challenges

The biggest external challenges for marketing lie in the regulatory and economic environment. Data protection requirements and regulation are perceived by more than half (54 percent) of companies as a major challenge, particularly affecting data-driven and personalised marketing approaches. Additionally, economic uncertainties (48 percent) and the increasing complexity of data management (46 percent) complicate the planning and management of marketing activities. The measurability of marketing measures (47 percent) also remains a challenge for many companies, especially in an environment characterised by fragmented channels and limited data availability.

Taken together, the results show that external conditions significantly increase the complexity of marketing management. Regulation, market uncertainty, and data complexity do not act in isolation but instead reinforce each other,

increasing the need for clear regulatory frameworks, reliable data structures, and legal certainty.

A Complex Environment and Increasing Need for Control

Regulatory requirements, economic uncertainties, and increasing data complexity are reshaping the framework conditions for marketing. Robust data strategies, reliable measurement approaches, and greater clarity in the regulatory framework are therefore essential.

Online Advertising and Digital Levy

Online advertising is a central component of digital value creation. It finances numerous digital business models and enables companies to efficiently market their products and services. For marketing, it is not only a communication tool, but a fundamental prerequisite for reach, growth, and competitiveness. At the same time, political discussions about the introduction of a digital levy are intensifying. In particular, proposals have been made to impose a levy on online advertising.

Importance of Online Advertising for Companies

Online advertising is essential for the revenue models of many digital business models—from e-commerce platforms to social media services—and supports the provision of a wide range of digital services. It enables scalable reach, targeted engagement, and measurable results, making it a key driver of data-driven marketing strategies. For small and medium-sized enterprises (SMEs) in particular, online advertising is a vital element of their marketing strategy. It allows efficient access to markets, customer groups, and digital sales channels—even with limited budgets.

Impact of a Digital Levy on Marketing

Price increases for online advertising would significantly limit the sales and marketing opportunities of many companies and weaken their competitiveness. Rising costs would mainly affect SMEs, whose marketing budgets are already under pressure. An additional levy on specific digital business

activities, such as e-commerce revenue or cloud services, would also have considerable negative effects on digital business models and the provision of digital services. Such measures could further discourage investment in digital infrastructure, innovation, and data-driven marketing.

Connection to Study Results

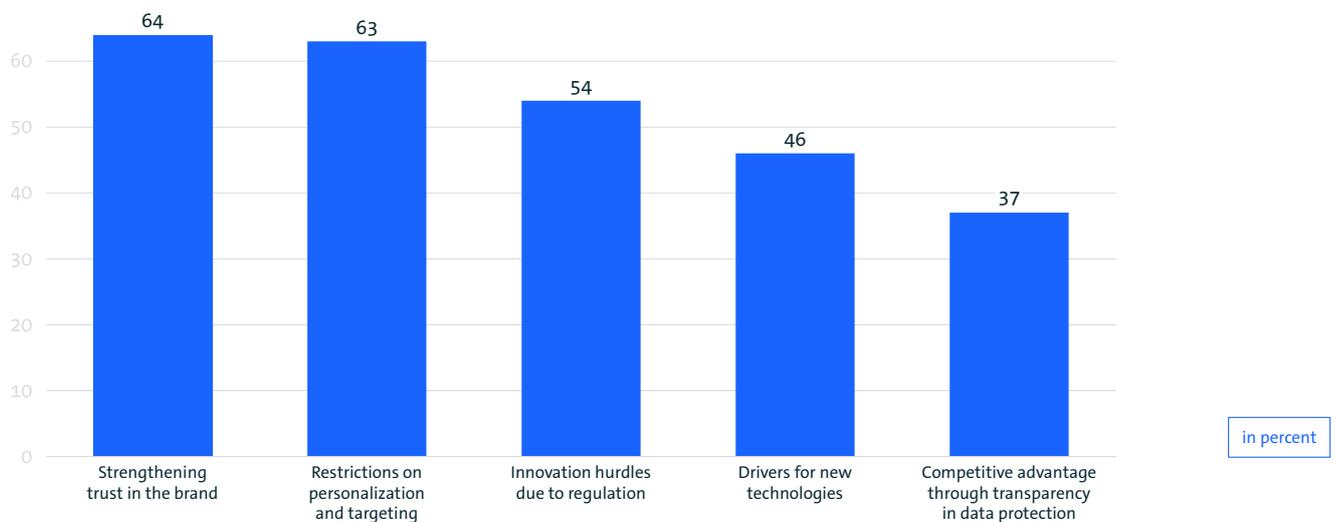
The results of the study show that companies are increasingly focusing on the efficient use of their marketing budgets and prioritising investments accordingly. At the same time, data-driven and digital marketing measures are becoming more important. An additional financial burden on key digital marketing channels would counter these developments and further limit the scope for innovation and growth.

4 Data Protection & Marketing

4 Data Protection & Marketing

4.1 Consequences of Data Protection Regulations

To what extent do the following topics play a role in your company's marketing as a result of data protection regulations?



Base: All surveyed companies (n=180) | Information for "Very large role" and "Rather large role" | Source: Bitkom Research

Figure 14: Consequences of data protection regulations for corporate marketing

Data protection regulations have a dual impact on marketing: On the one hand, they are perceived by many companies as restricting data-driven approaches—particularly in personalisation and targeting (63 percent), but also in terms of innovation potential (54 percent).

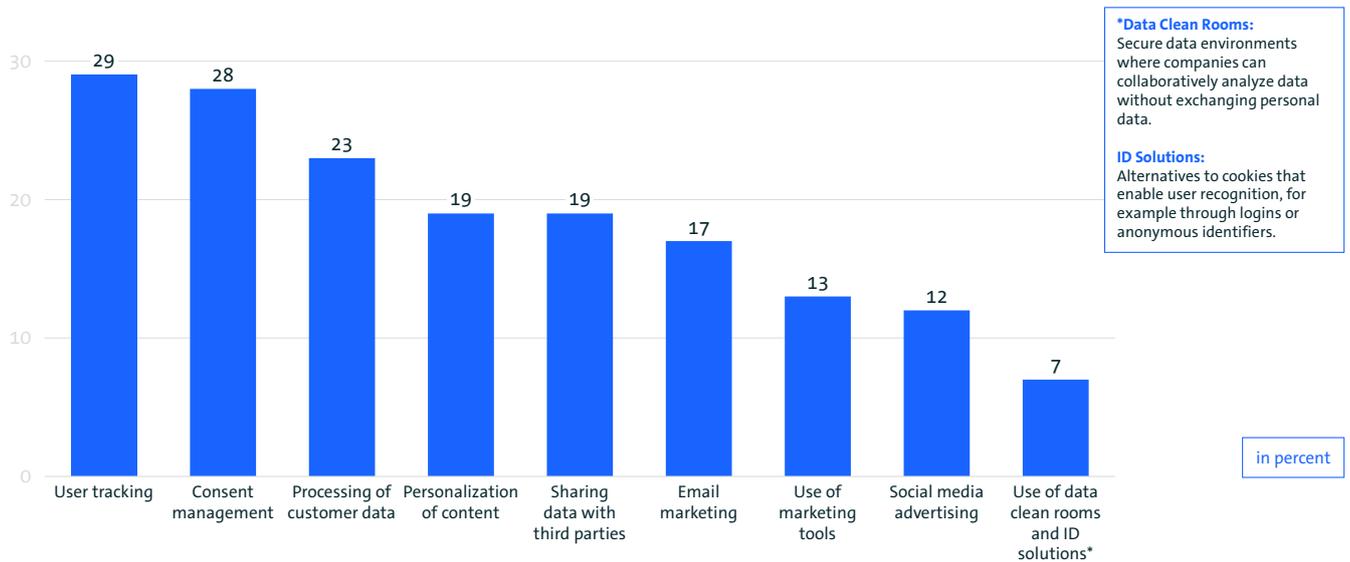
On the other hand, there is also a positive impact on brands and customer relationships: For 64 percent of companies, data protection makes a significant contribution to strengthening brand trust. Data protection is therefore not only seen as a regulatory requirement but increasingly as an element of credible and transparent communication.

Between Restrictions and Trust Anchors

Data protection fundamentally reshapes marketing: It limits data-driven approaches while simultaneously strengthening trust and credibility. Successful marketing must reconcile both perspectives.

4.2 Limitations Due to Data Protection Regulations

To what extent do you see restrictions due to data protection regulations in the following areas?



Basis: All surveyed companies (n=180) | Figures for «Large restrictions» and «Rather large restrictions» | Source: Bitkom Research

Figure 15: Restrictions due to data protection regulations

The perceived restrictions due to data protection regulations mainly affect areas in which marketing relies heavily on data. The effects are particularly evident in user tracking and consent management—areas where data is collected, combined, and analysed.

The processing of customer data and the personalisation of content are also perceived by a considerable share of companies as being significantly restricted. In contrast, the limitations are much less pronounced in operational channels such as email marketing, marketing tools, or social media advertising. Data protection therefore primarily affects the data-intensive touchpoints along the customer journey.

Data Protection Meets the Data Core

Restrictions primarily arise in areas where marketing depends on data: in tracking, consent management, and data processing. Practical solutions are therefore needed that reconcile data protection with effective data use and operational control.

Outlook: "Cookies" and Future Regulations

"Cookies" and comparable tracking technologies are a central tool for data-driven marketing: they enable reach measurement, performance monitoring, personalisation, and the management of digital marketing activities. At the same time, they are among the most heavily regulated areas of digital marketing.

Currently, the General Data Protection Regulation (GDPR), the ePrivacy Directive, and national interpretations significantly shape the practical use of cookies. The results of this study show that companies perceive significant restrictions, particularly in user tracking and consent management, and report increasing legal uncertainty.

Current Discussion at EU Level

In this context, the European Commission is pursuing a new approach with the so-called «Digital Omnibus» package: instead of introducing a standalone ePrivacy Regulation, access to end devices—and thereby also the use of cookies—is to be more systematically integrated into the framework of the GDPR in the future. A central element is the proposal of a new Article 88a GDPR, which aims to regulate access to end devices on a risk-based basis and replace the fragmented cookie regime that has evolved over the years.

This marks the first clear direction for future regulatory development: moving away from a blanket consent requirement towards greater differentiation based on the risk and purpose of data processing. In particular, there is intensive debate at EU level about whether and to what extent the use of cookies in the future could rely on alternative legal bases under the GDPR, such as legitimate interests, similar to other forms of data processing. The goal is to focus consent requirements on situations where a higher level of protection

is genuinely required, while effectively reducing consent fatigue.

In parallel, the Commission's draft also proposes machine-readable preference signals under Article 88b GDPR, intended to technically simplify cookie decisions. However, this concept is highly controversial, as it raises new legal and practical questions and could further increase dependency on dominant browser providers.

Significance for Marketing

These developments are highly relevant for marketing. If a risk-based approach prevails, certain data-driven applications—such as reach measurement, contextual advertising, frequency capping, or fraud detection—could in future be possible without mandatory consent. This would significantly improve the measurability, efficiency, and predictability of digital marketing activities while also enhancing the user experience.

Conversely, there is a risk that maintaining the current consent-based model could lead to additional technical and organisational complexity without significantly strengthening data protection. The study therefore highlights that companies are increasingly seeking regulatory solutions that balance data protection, economic viability, and innovation capacity.

Overall, cookie regulation at EU level is at a turning point. The trend towards greater harmonisation and risk-based differentiation is becoming apparent, but the precise regulatory framework remains the subject of intensive political and technical discussions. For marketing managers, it will be crucial to closely monitor and strategically assess these developments at an early stage.

5 Trends & Future Prospects

5 Trends & Future Prospects

5.1 Trends in Marketing, PR, and Social Media

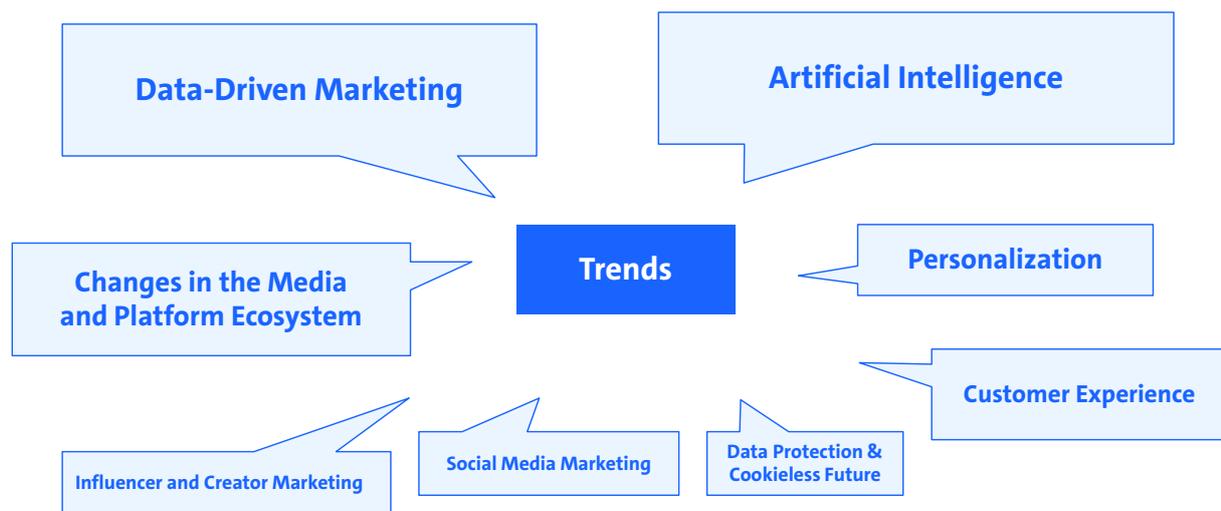


Figure 16: Trends in Marketing, PR, and Social Media

The identified trends reflect the ongoing digitalisation of marketing: Artificial intelligence, data-driven marketing, and personalisation symbolise the shift from communication-driven marketing towards system- and data-based approaches. In this context, marketing increasingly assumes a connecting role between technology, data, and customer interactions. Customer experience becomes the central reference point at which digital processes, channels, and content converge.

This transformation is complemented by changes in the media and platform landscape as well as the growing importance of social channels. Marketing thus becomes increasing-

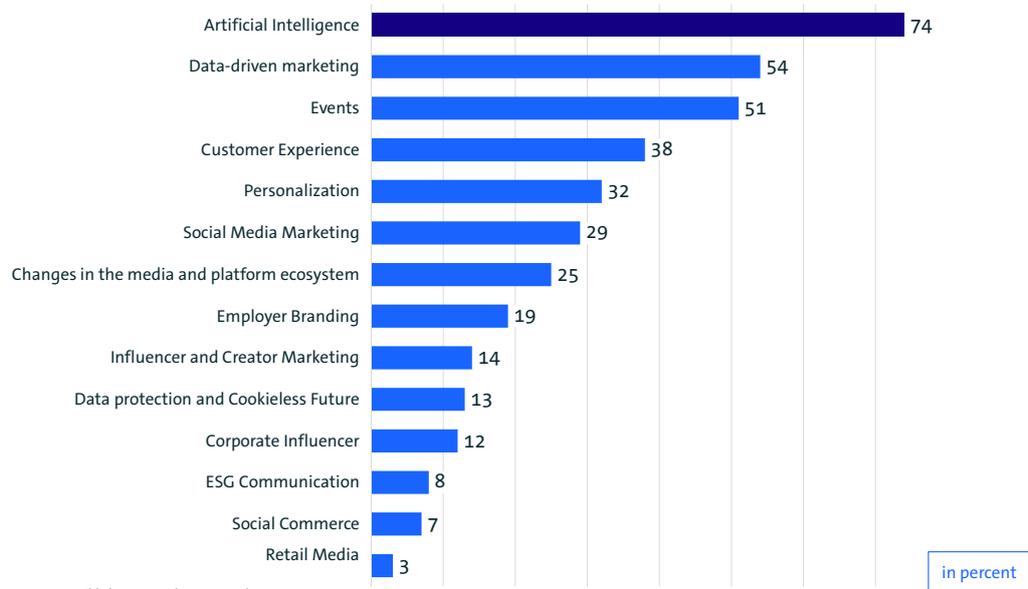
ly embedded in company-wide digital processes and is less viewed as an isolated communication discipline.

Marketing as a Digitalisation Function

Marketing is increasingly both a driver and a user of digital technologies. Trends such as AI, data integration, and customer experience are turning marketing into a central component of companies' digital transformation.

5.2 Impact of Trends on Budget and Investment Decisions

Which of these trends will have the greatest impact on your company's marketing budget and investment decisions by the end of 2027?



Base: All surveyed companies (n=180) | Multiple responses possible | Source: Bitkom Research

Figure 17: Impact of marketing trends on budget decisions

The impact of trends on budget and investment decisions highlights that the digitalisation of marketing is increasingly driven by technological decisions: Artificial intelligence is by far the most important driver of future investments and is considered relevant for budget allocation by a large majority (74 percent) of companies.

In addition, data-driven marketing (54 percent) and customer experience (38 percent) are also gaining importance. Investments are therefore guided less by individual channels and more by companies' ability to systematically connect data, processes, and customer interactions.

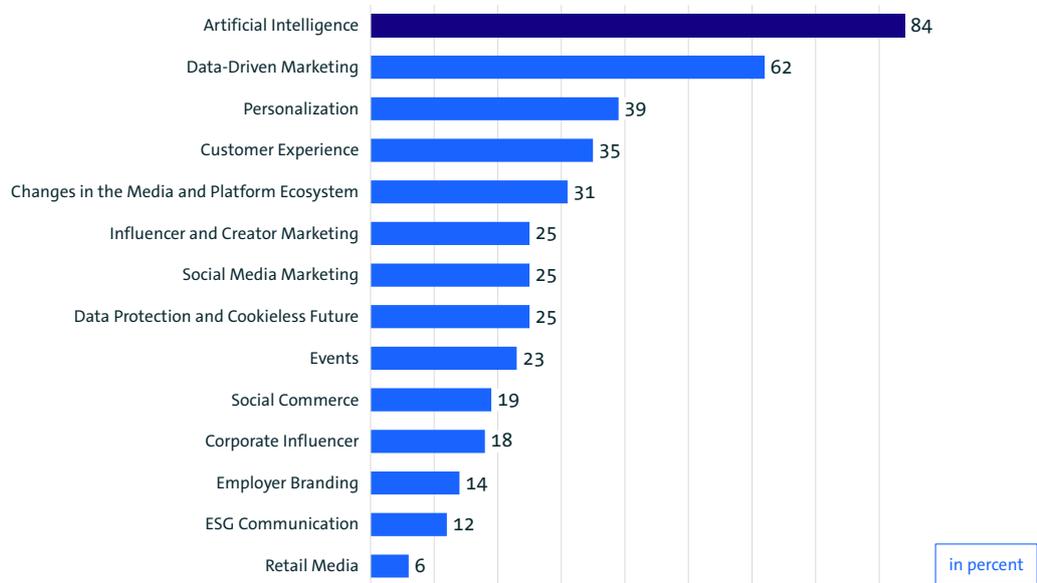
It is noticeable that traditional marketing disciplines and highly specialised individual channels play a more limited role in investment decisions. Budgets are increasingly aligned with structural digitalisation drivers rather than individual campaigns or short-term marketing measures.

Investment Decisions Follow System Logic

Budget decisions in marketing are increasingly driven by technological and data-related developments. Investments are increasingly directed towards areas where scalability, automation, and integration can be achieved.

5.3 Impact of Trends on Marketing in Germany

Which of these trends will have the greatest impact on marketing in Germany by the end of 2027?



Base: All surveyed companies (n=180) | Multiple answers possible | Source: Bitkom Research

Figure 18: Trends with expected impact on marketing in Germany by the end of 2027

The assessment of trends shows that marketing in Germany is at a structural turning point: developments such as artificial intelligence, data-driven marketing, and personalisation are seen not only as relevant but as critical to the future performance of the marketing sector. It is less about individual channels or measures and more about companies' ability to consistently integrate digital technologies, make effective use of data, and scale marketing processes. Companies that implement this transformation more quickly can achieve efficiency gains and strengthen their competitive position.

At the same time, the discrepancy between the high level of perceived relevance and the still partially limited level of implementation suggests that the competitiveness of marketing in Germany will increasingly diverge in the future—between pioneers of digital transformation and companies

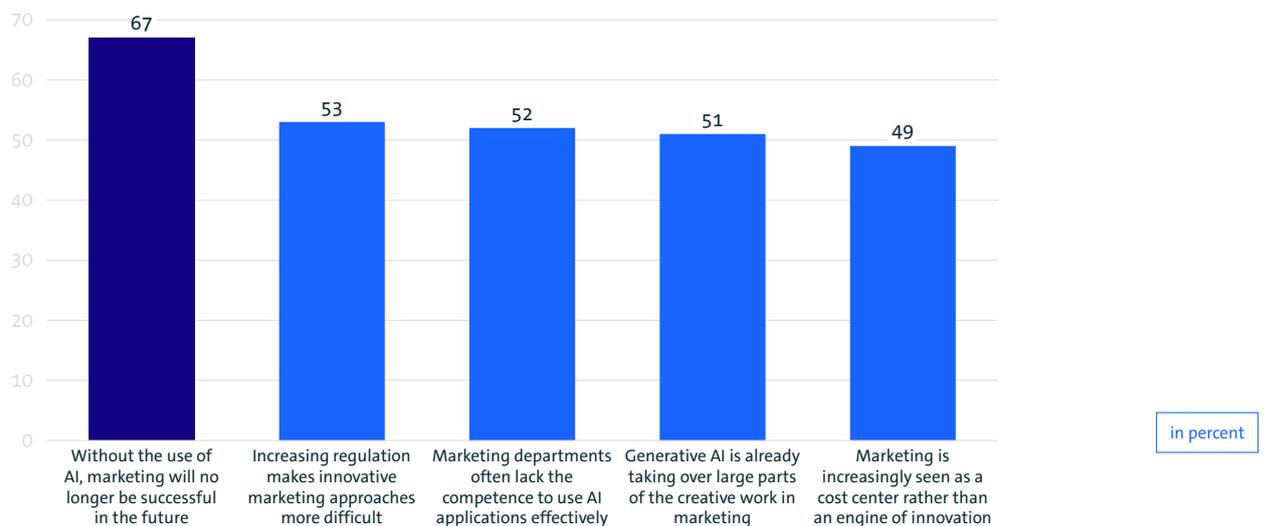
that structurally fall behind in the international competitive environment.

Marketing as a Competitive Factor

Trends such as AI and data-driven marketing are increasingly shaping the competitiveness of Germany as a marketing location. Speed, scalability, and integration of digital technologies are becoming key success factors.

5.4 Importance of AI for Marketing Success and Innovation Capability

Which of the following statements apply to your company or do you personally agree with?



Base: All surveyed companies (n=180) | Figures for "Applies" | Source: Bitkom Research

Figure 19: Assessments of the importance of Artificial Intelligence for marketing

The assessments of the companies underscore the strategic importance of artificial intelligence for marketing. AI is no longer understood as a supplementary technology, but increasingly as a central prerequisite for competitiveness and market success. Without the use of AI, many companies no longer expect their marketing activities to remain effective in the future.

At the same time, a clear tension emerges: While AI already performs creative and operational tasks today and offers significant efficiency potential, many companies still lack the necessary capabilities, clear strategies, and organisational structures to systematically deploy AI. Additionally, a shift in the perception of the marketing function becomes apparent: AI intensifies the pressure for efficiency and places marketing

more strongly within a cost and performance framework. Whether marketing can act as a driver of innovation depends significantly on whether companies succeed in using AI not only to optimise existing processes but also to enable new forms of value creation.

AI as a Driver of Innovation Potential

Artificial intelligence is emerging as a key factor in marketing success. It will determine whether marketing primarily serves to improve efficiency or evolves into a driver of innovation and growth.

6 Conclusion & Outlook

The results of the study indicate that marketing is undergoing a structural transformation. Although marketing budgets at the corporate level remain largely stable overall, the demands on effectiveness, efficiency, and control are clearly increasing.

At the same time, the digital marketing market in Germany continues to grow and is gaining increasing macroeconomic significance. The shift in marketing is therefore less about increasing budget shares and more about the evolving role of marketing within companies.

Marketing is increasingly evolving from a primarily communicative support function into an operational, data- and technology-driven core function of corporate management. Companies clearly prioritise business-relevant goals such as new customer acquisition, customer retention, and trust building. Accordingly, CRM-based, digital, and dialogue-oriented measures increasingly shape day-to-day marketing activities, while investments are shifting away from traditional advertising formats towards integrated, data-driven approaches.

Automation and artificial intelligence are becoming key levers to meet increasing demands with limited resources. At the same time, the study shows that there is often still a gap between technological ambition and organisational reality. Cost pressure, a lack of clear strategies, insufficient integration, and regulatory uncertainties currently limit the full potential of digital marketing approaches.

Looking ahead, it becomes clear that the long-term sustainability of marketing will increasingly depend on digital competence, data availability, and technological integration. Artificial intelligence is considered a key driver of marketing success and innovation capability across industries—not as an optional tool, but as a structural prerequisite.

For Germany as a marketing location, this means: competitiveness emerges where companies consistently leverage digital technologies, use data responsibly, and are able to scale marketing processes. At the same time, clear, practical, and coherent regulatory frameworks are needed that enable innovation, create legal certainty, and strengthen trust.

Marketing therefore becomes a benchmark for the overall digital performance of companies. Whether it primarily functions as a cost centre or as an innovation engine depends on how consistently technology, data, organisation, and regulation are aligned and integrated.

7 Methodology

Survey 2025

Client	Bitkom
Methodology	Online survey
Target Group	Companies from the network of the digital association Bitkom
Sample size	n=180
Survey period	Week 44 to Week 50 of 2025

Survey 2022

Client	Bitkom
Methodology	Online survey
Target persons	Members of the Bitkom committee distribution list: Marketing, Events & Sales, Public Affairs, Digital Marketing, Trade, Prospects, Marketing Managers, as well as Executives and Managing Directors in the ICT industry
Sample size	n=104
Survey period	Week 36 to Week 45 of 2022

[↗Marketing Study 2022](#)



Dr. Florian Bayer

Head of Digital Marketing &
Sales

f.bayer@bitkom.org

[↗ LinkedIn](#)

[Publisher](#)

Bitkom e.V.
Albrechtstr. 10 | 10117 Berlin
bitkom.org

[Scientific Management](#)

Bettina Lange

[Contact Person](#)

Florian Bayer

[Editor](#)

Alissa Geffert

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[DOI \(German version\)](#)

10.64022/2026-marketing

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Marketing budgets remain stable—while goals, measures, and priorities in marketing are changing. Digital and data-driven measures are used more frequently; automation and artificial intelligence are influencing workflows and decisions. At the same time, the demand to manage budgets transparently and comply with regulatory requirements is rising. This study analyzes how companies within the network of the digital association Bitkom allocate and use their marketing budgets, which measures and activities are currently shaping the field, and how investments, priorities, and framework conditions are evolving. Based on a survey of 180 companies, it provides well-founded insights into current marketing strategies, key challenges, and emerging trends in Germany.

DOI (German version)

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