



IMPACT

CMO SURVEY OF THE STATE OF MARKETING ACROSS
THE CENTRAL AND EASTERN EUROPE, 2024

INNOVATING TO IMPACT

dentsu

Foreword

THE CENTRAL & EASTERN EUROPEAN (CEE) REGION IS ONE OF THE MOST DIVERSE IN THE EMEA AREA. WITH ITS MULTITUDE OF CULTURES, RELIGIONS, ECONOMIC CONDITIONS, AND POLITICAL LANDSCAPES, BEING A MARKETER HERE REQUIRES SUPERHERO-LEVEL SKILLS.

Our CEE Impact survey captures the evolving landscape where brands are responding by increasing marketing investments and adopting new strategies. Marketing is increasingly seen as a strategic function integral to business growth, brand management, and alignment with evolving consumer sentiment. Despite the emphasis on ROI, over 40% of companies are still developing effective measurement models, indicating a gap in evaluating marketing performance.

Many companies are shifting more strongly towards digital media, with a growing interest in AI, despite the challenges of its integration. Nearly half of the companies are enhancing e-commerce capabilities, underscoring its increasing importance in marketing strategies. Improving customer experience is a priority for more than half of the companies, reflecting its critical role in maintaining competitiveness.

Efficiency and effectiveness in marketing investments are top concerns, with creative messaging and maintaining brand presence also high on the agenda. Inflation and declining consumer spending are also anticipated as major threats. Adapting to changing consumer sentiments, new measurement models, and the adoption of AI technologies are additional challenges that marketers will face.

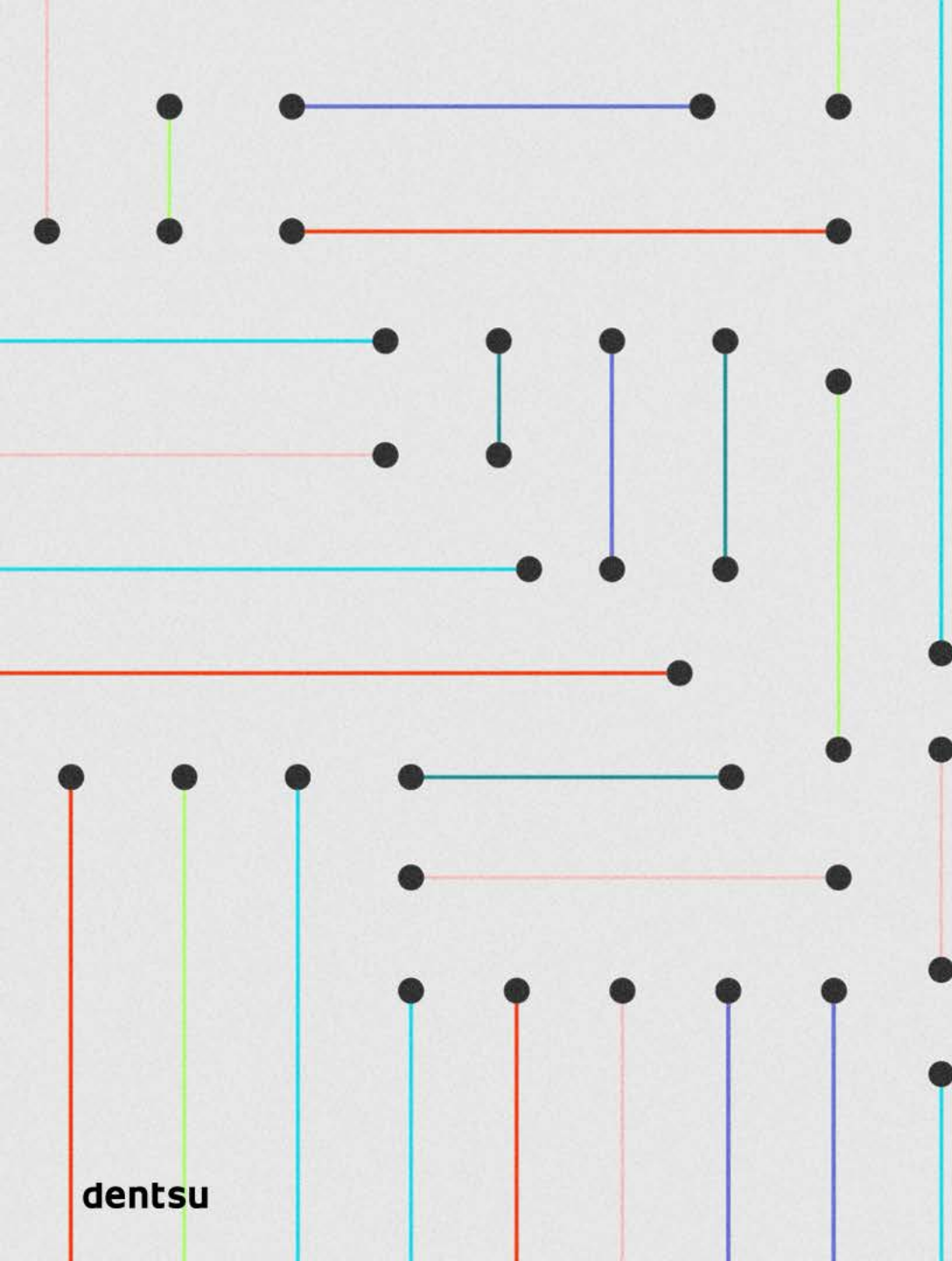
We also reveal where CEE marketers* plan to invest more as we move towards the 2030s. Our top strategic minds offer further insights and thought-provoking perspectives in this first-of-its-kind IMPACT survey.

Thank you for your interest. Please feel free to reach out if you wish to discuss any of the findings.

* The respondents represent a diverse range of market sizes, with the highest number of responses coming from Poland, the Czech Republic, and Romania, followed by Hungary, Slovakia, Croatia, Bulgaria, Albania, Serbia, and Slovenia.



Radoslav Nedelchev
Chief Client Officer
dentsu CEE



Contents

1.	Executive summary	p. 02
2.	Five key trends	p. 04
3.	Marketing strategies	p. 07
4.	Strategist's POV: 2030s	p. 10
5.	Challenges now and next	p. 11
6.	Strategist's POV: AI	p. 14
7.	Roles of marketing & agencies	p. 15
8.	Strategist's POV: Innovation	p. 18
9.	Future investments	p. 19
10.	Strategist's POV: Investments	p. 22
11.	Regional & vertical trends	p. 23
12.	About us & survey	p. 27



**FIVE KEY MARKETING TRENDS
ACROSS THE CENTRAL AND
EASTERN EUROPEAN REGION**

Five key marketing trends across the Central & Eastern European region

There is an ongoing evolution in marketing approaches, with a significant focus on digitalization, customer-centric strategies, and the need to navigate complex landscapes. While inflation and the cost of living remain troublesome in the CEE economic area, over one-third of surveyed CEE brands are increasing their marketing budgets for 2025.

1

DIGITAL TRANSFORMATION AND TECHNOLOGY INTEGRATION

There is a strong shift toward digital media and e-commerce investments. Brands are increasingly allocating their budgets to digital channels, AI, and Connected TV advertising, highlighting the importance of digital transformation in marketing strategies.

2

FOCUS ON CUSTOMER EXPERIENCE AND PERSONALIZATION

Improving customer experience and increasing personalization across all media are recurring themes. Companies recognize that tailoring experiences and communications to individual customer needs is essential for maintaining competitiveness and driving growth.

3

THE REGULATORY AND ECONOMIC ENVIRONMENT

Companies are concerned about regulatory challenges, such as government restrictions and taxes, as well as economic pressures like inflation. These factors are expected to influence business operations and strategies in the coming years.

Five key marketing trends across the Central & Eastern European region

4

IMPORTANCE OF INNOVATION AND EFFICIENCY

There is a clear emphasis on the need for innovation and efficiency. Companies expect their agency partners to drive innovation, particularly in technology and data, while also focusing on cost optimization and delivering measurable results.

Although agencies are seen as important partners, 25% of respondents are considering or planning in-housing.

Measuring efficiency is a concern for one in three marketers in the CEE region.

5

STRATEGIC ROLE OF MARKETING

Marketing is increasingly seen as a strategic function that contributes directly to business growth, brand management, and alignment with changing consumer sentiment. This underscores the expanding role of marketing in shaping overall business strategies.

While many companies already measure ROI, notably, over 40% of CEE marketers are just starting to do so regularly.

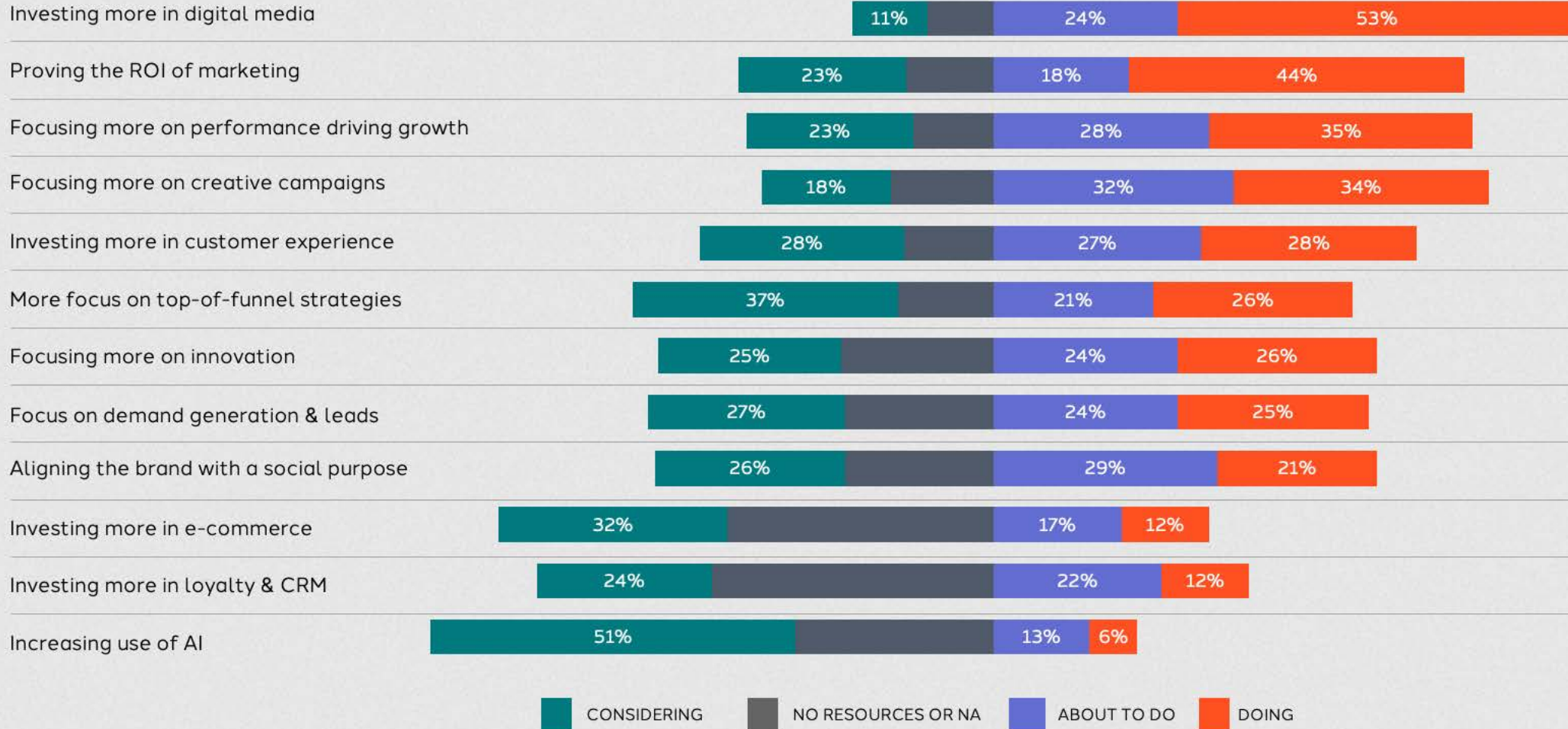
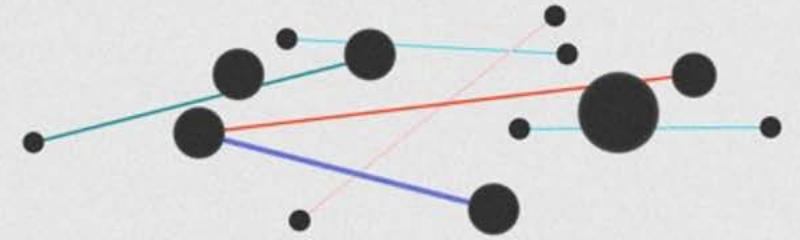
The results highlight the diversity of the CEE region, with both small and large companies, as well as marketers from businesses of all sizes, facing similar challenges.



**CENTRAL & EASTERN EUROPE
MARKETING STRATEGIES
NOW AND NEXT**

Marketing strategies in use across the CEE marketers

We asked which marketing strategies CEE marketers are currently using, which are planned or in the pipeline, and which they are considering for further investigation.



Marketing strategies in use across the CEE marketers



DIGITAL AND AI SHIFT

A significant number of companies are either already shifting or planning to shift more of their marketing spend to digital media.

The data indicates that companies are increasing their use of AI (Artificial Intelligence) in their marketing strategies or are considering doing so, reflecting the ongoing integration of AI technologies in marketing.

Currently, only 6% of brands are using AI, but 13% are about to incorporate it in their projects, and **51% are considering how to implement it.**

While this trend is encouraging, AI is also seen as one of the main challenges for the future.



E-COMMERCE

51% of marketers view **demand generation** and conversion strategies as key areas of interest for the future.

Additionally, 49% of respondents are either considering or have already shifted more **marketing spend toward e-commerce**, emphasizing the growing importance of online sales channels.

This aligns with the global trend of e-commerce and the rise of developed retail media, an area where the CEE region is still catching up.



FOCUS ON CUSTOMERS

Investing in improving customer experience is a priority for 55% of companies, with some already implementing such initiatives and others preparing to start. This highlights the **critical role of customer satisfaction in business strategies.**

Additionally, 46% of respondents are planning to develop different **loyalty schemes.**

The 2030s will be a decade of hard shifts

The next decade will demand an evolution in how we approach marketing and media, blending cutting-edge technology with the power of genuine human connection.

Here's where we think you need to act:

HYPER-HYPER PERSONALIZATION: AI-powered tools will drive personalization to new extremes. Forget about personas, consider persons. Brands will have the power to deliver personal experiences that will feel like second nature to consumers.

ACT NOW: Not just about data; it's about weaving insights into personal narratives that hit hard.

AI AS YOUR CREATIVE CO-PILOT: Creativity remains human-driven but isn't just for humans anymore. Use AI to spot trends from data and as an engine for production.

ACT NOW: Use AI to fuel the creative process.

OMNICHANNEL OR BUST: Consumers will no longer tolerate disjointed experiences. They expect brands to be seamless and available everywhere. AI & tech will be the linchpin in creating these flawless E2E experiences, making sure your brand's voice is consistent across every platform.

ACT NOW: Think omnichannel 24/365.

PURPOSE WITH A PUNCH: In the 2030s, empty slogans won't cut it. Consumers will demand authenticity, and we'll have more means to see through. Brands must align with real values—inclusivity, sustainability, and social responsibility.

ACT NOW: Get ready to put your money where your mouth is, or risk being called out.

IMMERSIVE TECH ENGAGES: The lines between the physical and the digital world will blur as mixed and virtual realities take center stage. These will be the battleground for brand loyalty, offering experiences that are unforgettable.

ACT NOW: Plan to integrate some immersive tech in your brand in the next years.

EVERYTHING IN REAL TIME: Wearable devices and the Internet of Things will produce new data streams that you'll need to use to deliver more real-time and context-sensitive advertising on smartwatches, connected cars, or smart homes.

ACT NOW: Make sure your data warehouse is prioritized.





**CHALLENGES THE CENTRAL AND
EASTERN EUROPEAN MARKETERS
FACE NOW AND WILL FACE IN
THE NEXT YEARS**

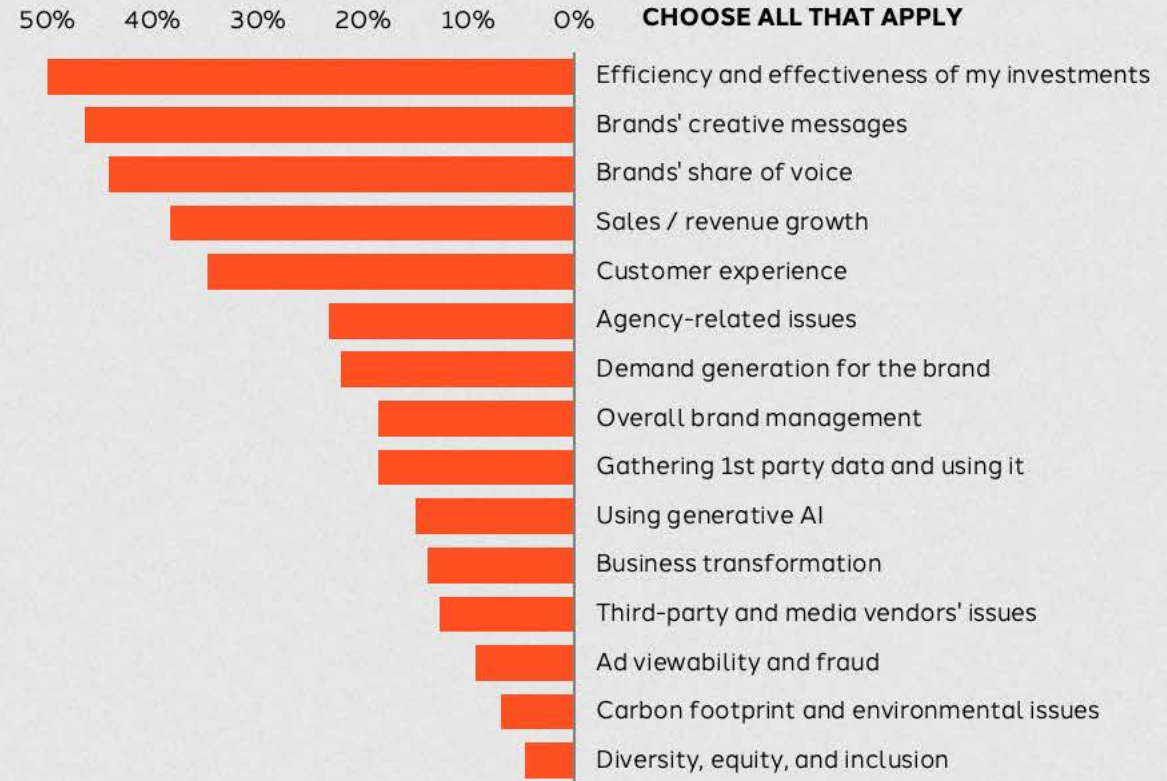
Challenges now show concerns over efficiency & effectiveness

The top challenges reveal a **fragmented media landscape**, and the intense competition faced by many CEE brands.

The primary concern for 53% of respondents was the efficiency and effectiveness of their investments.

Nearly half of the marketers (47%) were worried about the creativity of their brands' messages, while 44% were concerned with their brands' share of voice. Sales and revenue growth was a concern for 38% of respondents.

Conversely, CEE marketers were **less troubled** by issues such as ad viewability and fraud, carbon footprint, or DEI (diversity, equity, and inclusion). These topics received only a handful of mentions as current concerns for marketers.



Inflation and declining consumer spend are seen as the top future challenge

By a large margin, **inflation and declining consumer spending** are the top concerns for the future, with 55% of marketers worried about their brand's prospects.

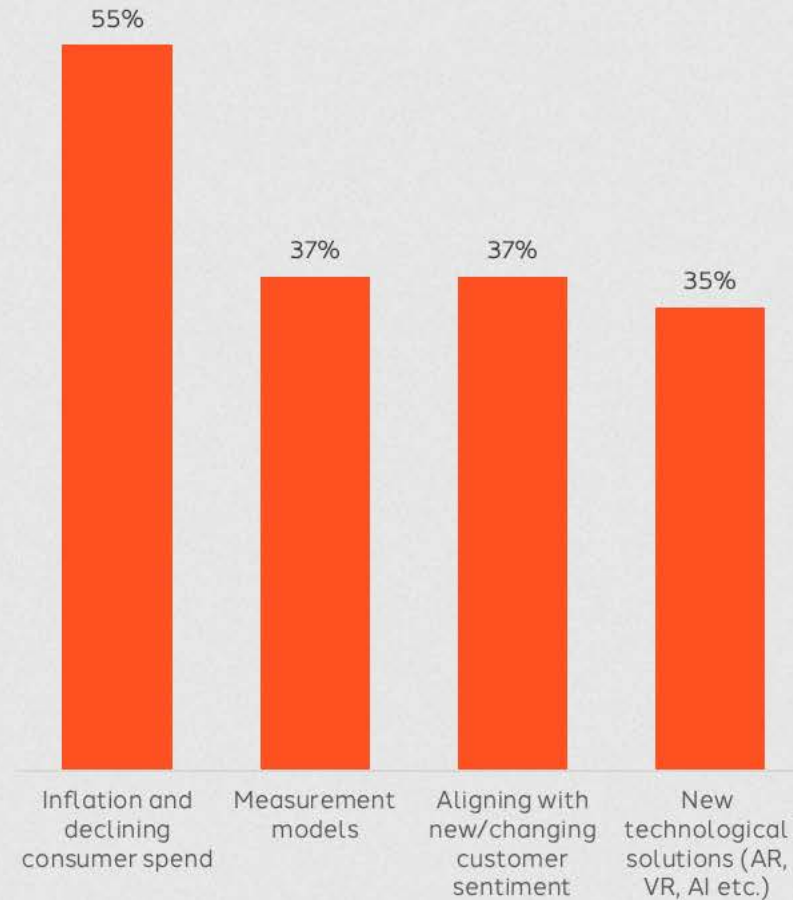
Companies are concerned about inflation and other economic pressures which could affect their **cost structures and consumer spending power**, making it harder to maintain profitability.

Tied for second place are 'Measurement Models' and 'Aligning with New and Changing Consumer Sentiments', each a concern for 37% of marketers. Measurement models are closely linked to efficiency and effectiveness, which are major challenges for marketers across the CEE region.

Aligning with evolving consumer sentiments is expected to be an increasing challenge, underscoring the importance of staying attuned to changing consumer preferences and attitudes.

In third place are **new technological solutions, particularly AI**. While 35% of marketers view new technologies positively, they also recognize associated challenges.

The rise of generative AI, for example, brings concerns such as bias, discrimination, privacy issues, job displacement, loss of human touch, transparency problems, and ethical dilemmas, in addition to the commonly cited legal and regulatory challenges.



How to blend the artistry of creativity and the precision of AI for marketing

At dentsu, we believe that AI has the potential to revolutionize marketing, blending data with creativity to unlock unprecedented opportunities for our clients.

While we recognize the challenges, especially around legal and ethical concerns, let's explore how our AI capabilities can elevate your marketing strategies.

Imagine your **customer data coming to life**, revealing hidden patterns and insights through AI-powered analytics. This deep understanding of customer behavior allows you to craft targeted campaigns that resonate on a personal level, building lasting connections.

Picture **personalized messaging as a symphony**, orchestrated by AI algorithms that adapt dynamically to individual preferences.

With AI-driven chatbots providing personalized recommendations and seamless support, your customer experience becomes unforgettable, leaving a lasting impact.

In media, **dentsu's AI-driven targeting** is like a finely tuned arrow, hitting the bullseye with precision.

For insights, by **analyzing user data quickly and accurately**, we ensure your ads reach the right audience at the right time, amplifying conversion rates and maximizing ROI.

AI also brings efficiency to every aspect of marketing. New tools reduce optimization time from hours to minutes, and automated machine learning algorithms optimize media placements 24/7.

This allows your team to focus on strategy and creativity, unleashing their full potential.

AI dives deep into social media conversations, search trends, and market data, uncovering emerging trends and consumer behaviors.

This foresight helps you seize new opportunities and stay ahead of the curve.

Finally, **imagine media buying as an art form, with AI optimizing strategies** by analyzing historical data and real-time conditions. Every decision is meticulously curated to maximize your budget, driving campaigns to new heights.

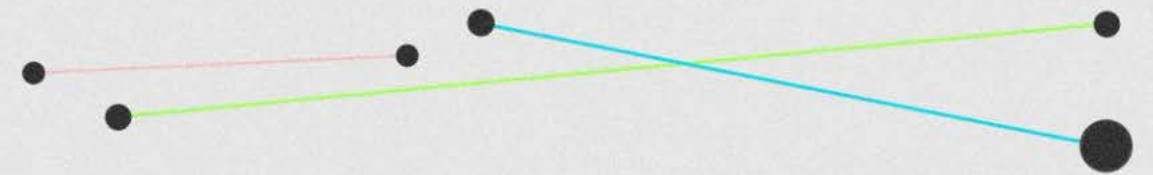
At dentsu, we blend the artistry of creativity with the precision of AI, crafting marketing masterpieces. Join the revolution now.



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MARKETING FUNCTIONS AND AGENCIES' ROLES

Primary role of marketing is seen to deliver tangible business growth



Four out of ten respondents view the primary role of marketing as **delivering business growth**, highlighting the direct impact of marketing on the company's bottom line.

Managing the brand effectively is also seen as a key responsibility, with 21% of respondents considering it the main role. This underscores the need to maintain and enhance brand equity.

Developing the overall customer experience is another important role of marketing, reflecting the significance of customer satisfaction and loyalty in driving long-term success. 18% of respondents identified this as their primary role.

One in ten marketers believes that a **deep understanding of consumer and market trends** is essential to their role. Given the increasingly fragmented media landscape and the need to keep pace with consumer behavior, this is a significant aspect of the job.

Ensuring strong market positioning and highlighting the brand's **corporate social responsibility** actions are considered priorities by 5% of respondents.

Additionally, 4% of respondents view marketing as having a strategic role in aligning the brand's vision and objectives with the overall business strategy, ensuring that marketing efforts support broader organizational goals.

The role of agencies is seen as driving innovation

Most marketers in the CEE region work with a range of agencies, including those specializing in creative, media, technology, data, performance, PR, influencer marketing, and business consulting.

When asked about the most important and relevant features, respondents unanimously agreed that an agency's ability to drive innovation is its primary role. Competencies in technology and data were considered the second most important.

Additionally, a focus on efficiency, cost reduction, and price optimization, as well as social media capabilities, deep expertise in media and creative, and understanding consumer behavior were also seen as important. However, there were slight differences in the 'not important' votes for these features.



82%

of CEE marketers say innovation is the core role of an agency partner



69%

of CEE marketers say technology and data are the core qualities of an agency partner

Innovation thrives on bravery

While the goal of advertising - connecting brands with audiences—remains the same, the methods are rapidly evolving.

New tools and platforms bring complexity and fragmentation, making innovation a key focus.

Real innovation requires collaboration between agencies and clients. Our role as an agency is to **foster a culture of experimentation** by providing processes, creative capabilities, data insights, and pushing for brave solutions.

We need your business knowledge to push boundaries and fuel bold, innovative solutions.

NOT ALL INNOVATIONS ARE GROUNDBREAKING

Some, like trying new targeting methods, are small steps in the right direction.

Truly transformative ideas come with risks and uncertainties.

Evaluating them based solely on past performance limits their potential.

That is why we need to **shift our mindset about innovation**. Instead of asking for proofs of how supposedly new ideas worked in the past, we need to start asking how we can make **new ideas successful and stronger**.

By turning our minds to finding solutions and demonstrating a willingness to take calculated risks, we open the door to true innovation. **Bravery is a core part of making innovation work** in media and advertising creative solutions.

Innovation thrives when **bravery is valued, risks are openly discussed, and there is room for experimentation and learning** from both successes and failures.

Innovation in advertising is not just about new technologies or creative concepts.

INNOVATION IS A WAY OF WORKING.

It is a shared commitment between the agency and clients to explore uncharted territories.

I encourage all to an open dialogue about potential innovations and how we can bring them to life with bravery at the front and center.



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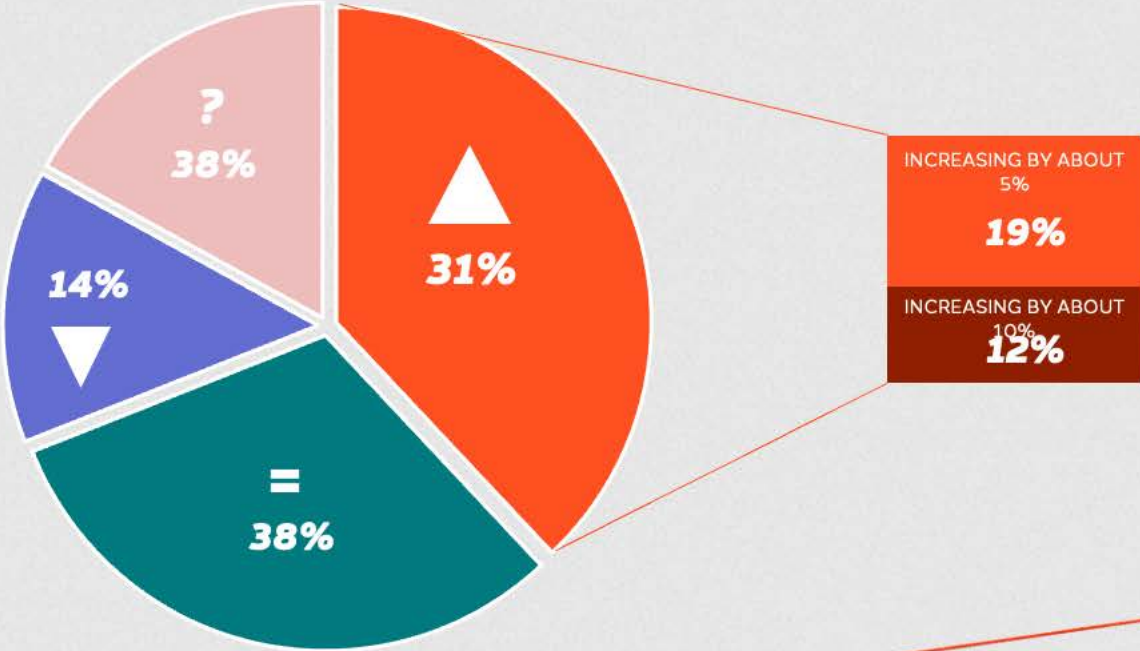
**FUTURE INVESTMENTS
ACROSS
THE CENTRAL & EASTERN
EUROPEAN REGION**

One-third of CEE marketers are increasing their budgets for 2025

The CEE region has faced challenging years due to inflation, economic uncertainty, and the cost of living, yet it has been growing since 2021.

Marketing spending typically aligns with GDP trends, rising and falling accordingly. According to UniCredit Bank, CEE macroeconomic growth is projected to be 3% in 2025. In dentsu's Ad Spend Report, a 2.5% increase in marketing spending in the CEE region is expected compared to 2024.

While 40% of companies plan to keep their budgets stable, over one-third of brands intend to increase their investments in marketing and communication. Our survey indicates that larger companies with over 500 employees are more likely to boost their budgets compared to smaller companies.



Investment increase in Performance and Branded Content

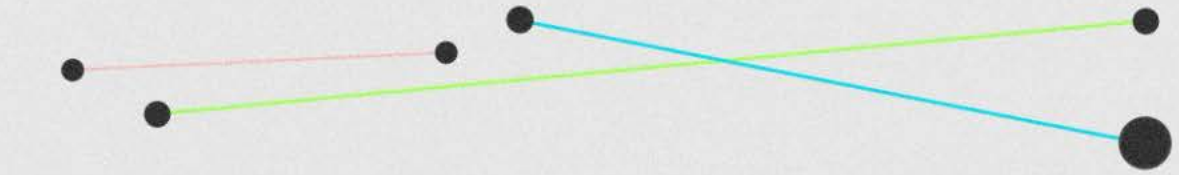
Performance marketing, including biddable media, search, and paid social, is a key area where companies are planning to increase investment, highlighting the importance of measurable, results-driven marketing strategies.

Branded Content, such as a brand's owned social media and other digital assets like apps and websites, is expected to see a significant boost in investment in 2025 within the CEE region.

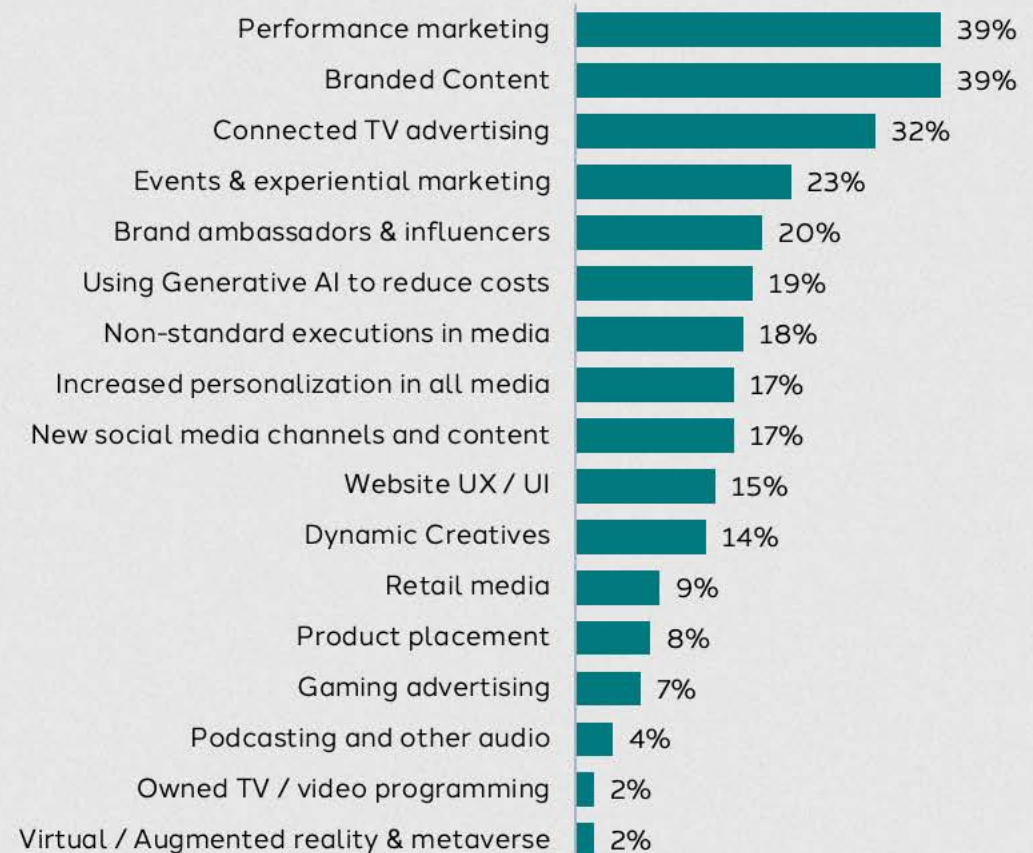
Connected TV advertising is also emerging as an attractive area for future investment, reflecting the growing relevance of digital television platforms for reaching audiences. Connected TV (CTV) involves buying advertising programmatically for smart TVs.

Given the slow growth of CTV in the CEE region, it is encouraging to see it in third place, with 32% of advertisers planning to increase their investments in this area.

Additionally, events and experiential marketing are receiving more investment from 23% of CEE marketers, emphasizing the value of creating immersive and engaging brand experiences as part of a comprehensive consumer experience.



Considering your vertical, market, and brand, what are the most interesting media or creative aspects you want to invest more in in the next years? Choose three most important



Navigating investment gaps in the CEE



When comparing the CEE region's future investments to global trends expected in the coming years, a few key issues stand out.

While data aligns with global investment trends—particularly in digital channels like Connected TV and Branded Content—there are **significant areas of underinvestment**.

CEE markets are keeping pace with global shifts toward **digital and performance-driven marketing**, driven by the need to reach new audiences, leverage advanced data insights, and optimize marketing spend in a rapidly evolving digital landscape.

However, **gaming and podcasting are receiving less interest from marketers in the CEE compared to global trends**.

This discrepancy can be attributed to regional complexity: for even large marketers in smaller markets, media like gaming often feels out of reach due to budget constraints.

Yet, there are **accessible entry points to gaming such as rewarded videos or in-game ads**, which present lower barriers. This should be seen as a missed opportunity, as the environment commands high user attention.

Podcasts also face a global investment gap, with advertising spend falling far short of daily consumption.

This is especially true in the CEE, where digital audio formats receive less investment compared to traditional media.

Additionally, **sizing podcast audiences across platforms is challenging**.

This is particularly true in non-English-speaking markets, further complicating advertisers' ability to justify and optimize podcast spending.

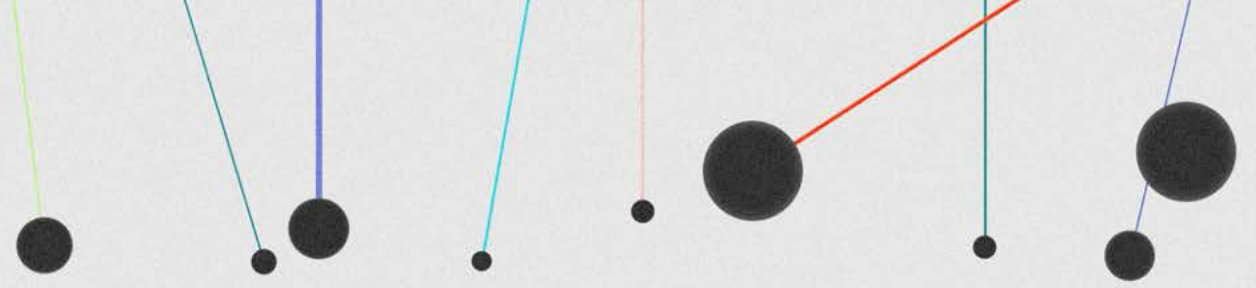
The growing emphasis on personalization and AI reflects a global recognition of the need to innovate at scale, helping brands meet consumer expectations and maintain a competitive edge.

Lastly, the focus on experiential marketing and influencers aligns with global trends, as brands increasingly rely on these strategies to deepen consumer connections and drive engagement, particularly in saturated digital markets.

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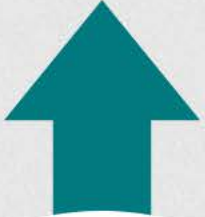
REGIONAL & INDUSTRY DIFFERENCES INSIDE THE CENTRAL & EASTERN EUROPE

Regional outlook: Market trends summary



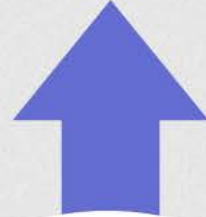
DIGITAL MEDIA SHIFT

Markets such as Croatia and Czechia are on the cusp of making significant shifts from offline to digital media spending, reflecting a growing recognition of the importance of digital channels.



E-COMMERCE INVESTMENT

Romania, Croatia, and Serbia are showing a strong interest in or are already increasing their investments in e-commerce. This aligns with global trends, where e-commerce continues to grow rapidly.



AI UTILIZATION

Most markets, including Bulgaria, Czechia, Hungary, and Romania, are considering increasing their use of AI, indicating a growing trend towards leveraging AI for marketing efforts.



PERFORMANCE MARKETING

Czechia, Hungary, Poland, and Serbia are either about to implement or increase their use of performance marketing, indicating an imminent shift towards this approach.

Vertical investment outlook: Top future investment area per vertical

BRAND AMBASSADORS & INFLUENCERS



ELECTRONIC APPLIANCES



FMCG CARE

BRANDED CONTENT



HOME GOODS



ENERGY



AGRICULTURE



LUXURY



MEDICAL



LIVING



ENTERTAINMENT & MEDIA

CONNECTED TV ADVERTISING



GAMES, TOYS, GAMBLING



RETAIL



FMCG, FOOD & DRINKS

EVENTS & EXPERIENTIAL MARKETING



TECH & IT



ALCOHOL



REAL ESTATE

INCREASED PERSONALIZATION IN ALL MEDIA



RESTAURANTS



SPORTS & CLOTHING

USING GENERATIVE AI TO REDUCE COSTS



FINANCIAL & INSURANCE



INTERNET



PHARMACEUTICALS

RETAIL MEDIA



TRAVEL & TOURISM

Vertical investment outlook: Key industry trends summary

TREND #1

NEXT CHALLENGES

Key challenges vary significantly across industries. For example, the automotive sector faces fewer digital-related challenges, as it is relatively advanced in marketing and advertising on digital platforms.

In contrast, industries like alcohol and electrical appliances prioritize various digital and experiential challenges, such as e-commerce and experiential marketing.

#1

dentsu

TREND #2

MARKETING STRATEGIES

Most industries, such as alcohol, energy, and living, are heavily focused on upcoming digital transformations. This includes shifting marketing spend to digital and e-commerce channels and prioritizing customer experience.

In contrast, the automotive sector shows less emphasis on these trends, indicating diverse strategic priorities across different industries. Overall, digital strategies dominate across all sectors.

FMCG brands are noted for their emphasis on social purpose strategies. The pharmaceuticals sector is focusing on innovation and top-of-funnel strategies. Retail leads in prioritizing customer experience, with significant digital investments and omnichannel strategies.

In terms of digital adoption, the finance and insurance sector takes a cautious approach. While online banking and mobile apps are common, the industry also faces regulatory challenges.

#2

TREND #3

BUDGETS

Retail is making significant investments in e-commerce and digital initiatives, reflecting an industry-wide shift towards online retailing.

In contrast, pharmaceutical budgets remain heavily allocated to traditional channels due to regulatory compliance.

FMCG brands allocate their budgets across a broad spectrum, with notable increases in digital spending and brand-building activities, such as influencer marketing.

#3

About the survey and dentsu

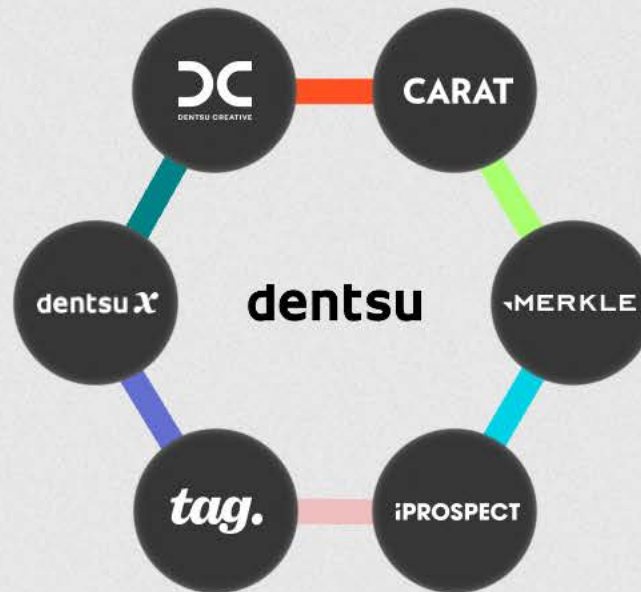
Dentsu is an integrated growth and transformation partner to the world's leading organizations. Founded in 1901 in Tokyo, Japan, and now present in approximately 120 countries, it has a proven track record of nurturing and developing innovations, combining the talents of its global network of leadership brands to develop impactful and integrated growth solutions for clients.

For over 120 years, innovation has been a core tenet of dentsu's offering—exploring new ways to reach, engage, and nurture relationships with audiences. Dentsu is at the cutting edge of the industry, producing new ways of working and generating growth through the power of technology and creativity.

Through innovation, we ensure the impact our clients need to drive growth in their business, while also generating a positive effect on the industry, society, and the world. Innovation at dentsu is always in pursuit of an outcome, meaning we are always focused on the end impact that we'll have for a client and their communities. For some businesses, this might be hard return on marketing investment or increasing revenues, but for others, it may be driving behavioral change, building a positive culture, or connecting disparate communities.

Innovating to impact, on a global scale

Dentsu delivers end-to-end experience transformation (EX) by integrating its services across Media, CXM, and Creative. Our network of global leadership brands allows us to offer deep expertise from teams that have been honing their craft for decades. But when we come together, we can drive a multiplier effect for clients at a global scale, through the development of Integrated Growth Solutions that are underpinned by our promise to clients: innovating to impact.



The survey on marketing in the CEE region was conducted in 2024 and distributed to renowned marketing experts across Central and Eastern Europe. The respondents represent a diverse range of market sizes, with the highest number of responses coming from Poland, the Czech Republic, and Romania, followed by Hungary, Slovakia, Croatia, Bulgaria, Albania, Serbia, and Slovenia. Participants included professionals from all industries and company sizes, primarily from brands engaged in consumer marketing. In total, over 200 marketers across the region participated in the survey.

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Contributors: Agnieszka Heidrich, Malgorzata Niska, Marian Petcu, Zdenka Zlatušková

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