



Fractional CMO Landscape Research

Global Context, Baltics & Poland (2026)



Audience: CEOs / founders of SMEs and scaling mid-market companies (Lithuania, Latvia, Estonia, Poland)

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Executive summary (what CEOs should know)

- Only 27% of CEOs and CFOs believe their CMO has exceeded expectations – signalling a structural gap between marketing activity and business outcomes.
- In many companies, marketing still operates as a “black box”: plenty of activity, but limited clarity on what actually drives pipeline and revenue.
- Across the Baltics and Poland, digital maturity is improving, but skills shortages and the lack of marketing leadership remain among the main drivers of “messy marketing.”
- Companies are increasingly buying strategic management rather than random implementation tactics: clear priorities, measurement, accountability, and a defined go-to-market direction.
- A fractional CMO is becoming a lower-risk alternative to a full-time executive when speed, experience, and tangible impact are required.
- The core business value: clarity, faster decisions, less wasted budget, and more predictable growth.

1. Definitions

Definition used here: a [Fractional CMO](#) (Chief Marketing Officer) is a senior marketing director who works part-time (typically 1–3 days/week) for a company, embedded into leadership cadence and accountable for outcomes, while the company keeps execution with internal staff and/or agencies.

I[nterim CMO](#) is a senior marketing director who steps into a company on a temporary, full-time or near-full-time basis to lead the marketing function during a period of transition, change, or instability.

Both can be referred to as External CMO.

Evidence rules: This report prioritises primary and highly reputable sources (Gartner, The CMO Survey, PwC, Eurostat, OECD, EU



2. Global benchmarks: what mature markets indicate (US, UK, EU, Australia)

Why CEOs should care: the Baltics/Poland typically follow mature-market operating models with a time lag. Understanding what is already 'normal' elsewhere helps you anticipate what will become standard locally.

Market	What's happening (CEO view)	Representative stats	Source
US / global benchmark	Marketing is under high scrutiny; budgets pressured; businesses seek flexible senior talent when growth is urgent but hiring is slow.	Marketing budgets ~7.7% of company revenue in 2025 (flat vs 2024).	Gartner CMO Spend Survey press release (2025)
UK	Marketing leadership is being asked to deliver transformation and prove value; interim/fractional pathways are increasingly visible in leadership careers.	UK marketing leadership research sample sizes show ongoing study of CMO role and expectations (context indicator).	Deloitte UK CMO insights (data collected Oct 2024)
EU (overall)	SMEs are progressing in digitalisation but still below 2030 ambition; skills gaps remain structural.	In 2024, 73% of EU SMEs reached at least basic digital intensity (Digital Intensity Index).	Eurostat Digitalisation in Europe 2025 / Digital Decade indicators
Australia	Interim executive market is long-running and measured; fractional/interim models are a recognised alternative career and hiring route.	Australia has an established annual interim executive survey (15+ years), tracking motivators and market dynamics.	Watermark Search – Annual Interim Executive Survey (2025)

CEO implication: In mature markets, marketing is expected to be measurable and tightly linked to revenue and growth. When that link is weak, CEOs increasingly look for CMO-level leadership that can install governance, measurement, and prioritisation quickly—often without the risk of a permanent executive hire.

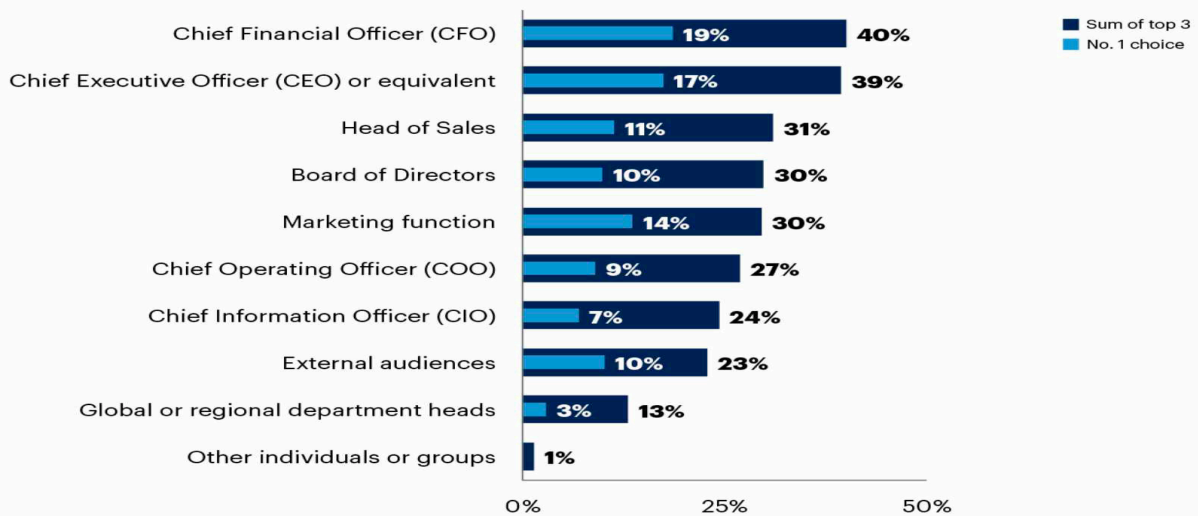
3. How CEOs evaluate marketing

This section focuses on what CEOs and CFOs (not marketers) signal about marketing performance and credibility.

Figure 1: Individuals or Groups That are Most Skeptical of Marketing's Value at Their Company:

CFO & CEO Most Skeptical of Marketing's Value

Sum top 3 and top choice



n = 345 senior marketing leaders, excluding don't know/NA

Q: Which of the following individuals or groups are the most skeptical of marketing's value at your company?

Source: 2024 Gartner Marketing Analytics and Technology Survey
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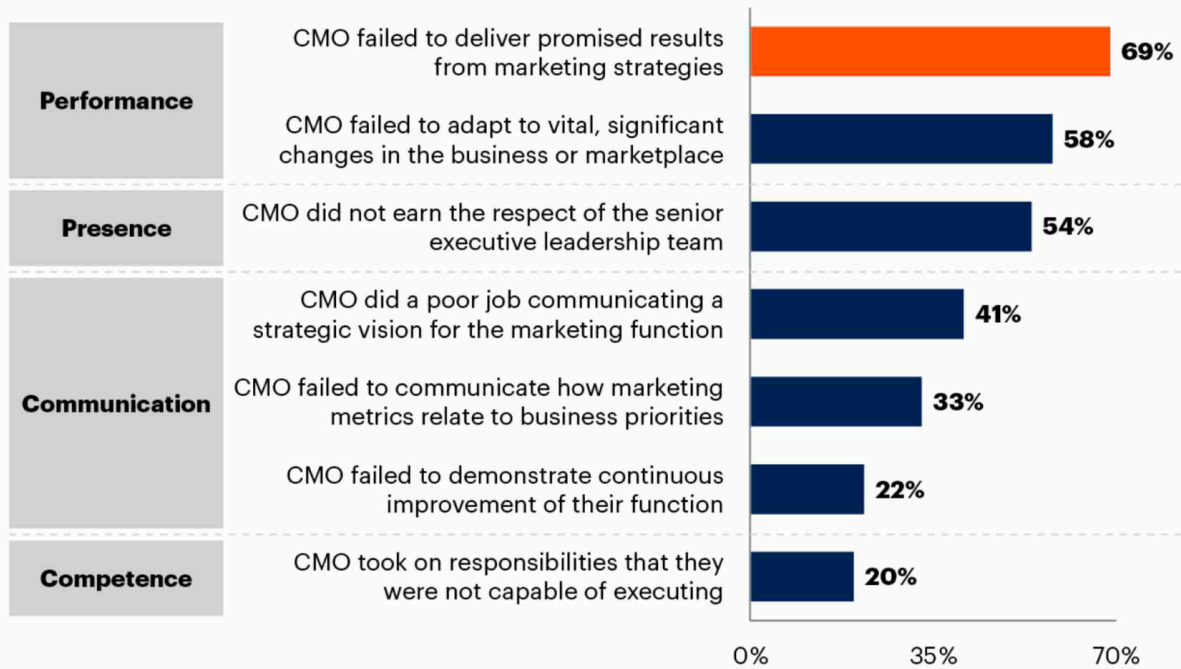
Gartner.

Source: Gartner (September 2024)

Key findings (global):

- Only 27% of CEOs and CFOs said their CMO's performance exceeded expectations in the last year (Gartner, Feb 2025).
- CMOs identify CEOs (39%) and CFOs (40%) as the most skeptical executives regarding marketing's value (Gartner, Sept 2024).
- Marketing leaders report increased pressure to prove value: pressure from the CEO rose to 61% and from the CFO to 63% (The CMO Survey highlights report, 2025).

Figure 1. Scenarios Most Likely to Lead to CMO's Removal



n = 123 CEOs and CFOs

Q: Which scenario would most likely lead to the removal of your company's CMO from their role? Rank up to 3.

Source: 2024 Gartner Senior Executive Views of CMO Leadership Survey

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Insight: for many leaders, marketing still feels like a black box – something unpredictable and risky.

4. Baltics & Poland: structural conditions that create External CMO demand

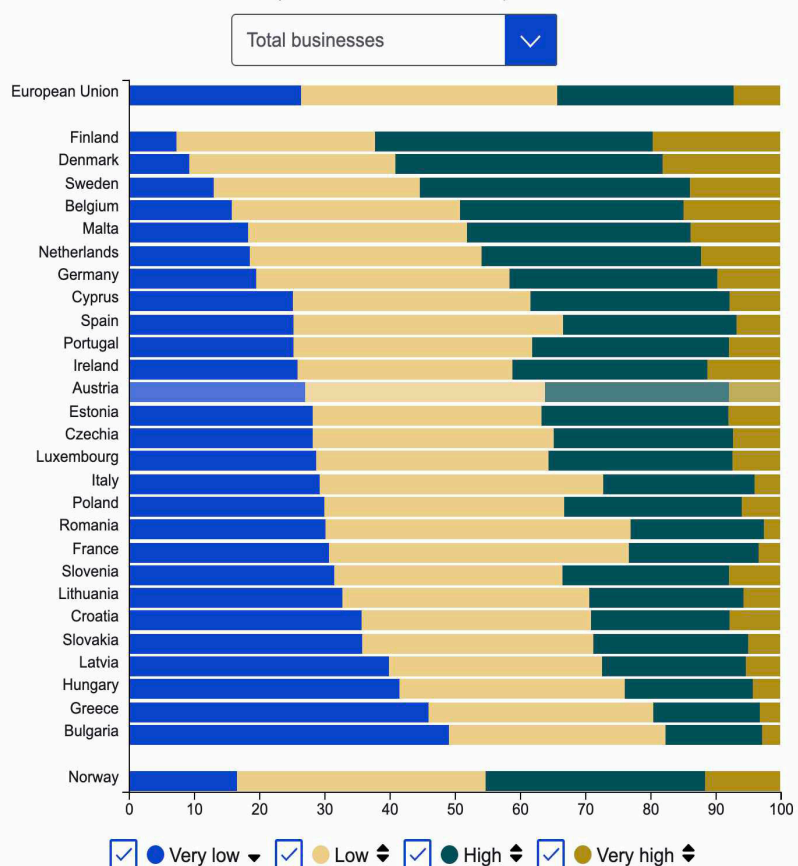
According to European Union data, the level of digitalisation among small and medium-sized enterprises is expected to continue rising in the coming years. This means that more organisations will be forced to adopt new marketing and data management tools, integrate them properly, and ensure interoperability between systems. As the technological environment expands, marketing is increasingly becoming a complex management system that requires not only technical expertise but also senior-level decision-making. For this reason, a structural demand is emerging for marketing leaders – specialists capable of connecting technology, processes, and people into a coherent, results-driven growth architecture.

EU-wide baseline for context:

In 2024, 73% of EU SMEs reached at least a basic digital intensity level, but most SMEs still score low/very low on the Digital Intensity Index, meaning digital tools are often present but not yet integrated into a mature growth system.

Digital intensity level in businesses, 2024

(as % of total businesses)



Source: Eurostat

Digitisation intensity in each country (what we can evidence by the EU statistics).

Lithuania

Lithuania 2025 Digital Decade [Country Report](#) and national Digital Decade roadmap highlight strong connectivity/startup ecosystem, but ongoing challenges in SME digitalisation and skills (as per EU reporting).

Primary source(s): Lithuania 2025 Digital Decade Country Report (EU) + Lithuania National Digital Decade Roadmap (EIMIN).

Latvia

Latvia shows progress in SME digitalisation and enterprise digital skills, but remains below EU average on basic digital skills among enterprises (2023).

Primary source: Latvia 2024 Digital Decade [Country Report](#) (EU).

Estonia

Estonia's SME digital intensity is below EU average; adoption of advanced tech (data analytics, AI) also below EU average (2023 baseline).

Primary source: Estonia 2024 Digital Decade [Country Report](#) (EU).

Poland

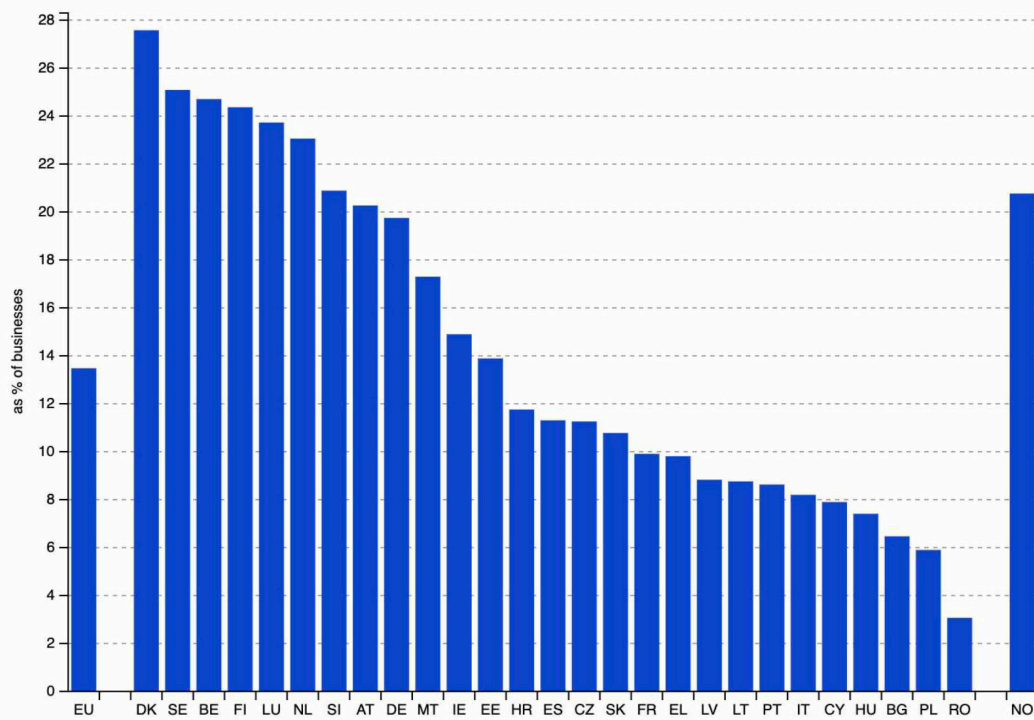
Poland's digital skills in population are below EU average (2023 baseline); innovation indicators show SMEs below EU average on product/process innovation, which often correlates with weaker differentiation and Go-to-market (GTM) discipline.

Primary source(s): Poland 2024 Digital Decade [Country Report](#) (EU) + European Innovation Scoreboard [country profile](#) (2024/2025).

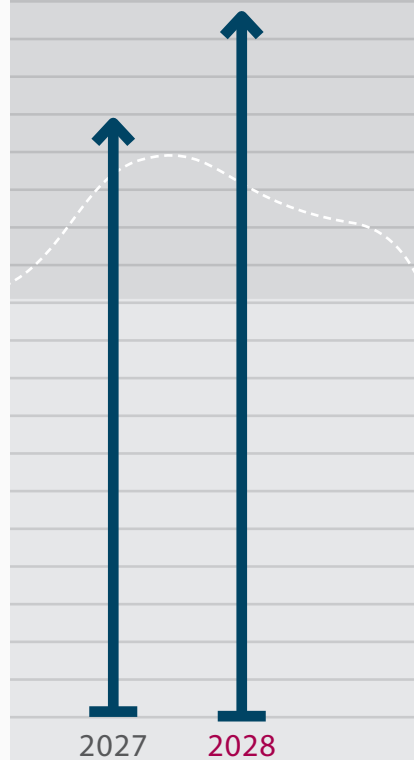
Digital tools are typically implemented, but not integrated into a mature growth system. As digitalisation accelerates and the adoption of AI becomes more widespread, this will become an increasingly important factor for continued company growth.

Companies need support in building and learning how to apply a modern marketing technology stack. This, in turn, would significantly boost marketing effectiveness and improve how the company is perceived by existing and potential customers.

Businesses using AI technologies, 2024
(as % of businesses)



Source: Eurostat



5. Skills shortages and why they matter for marketing leadership

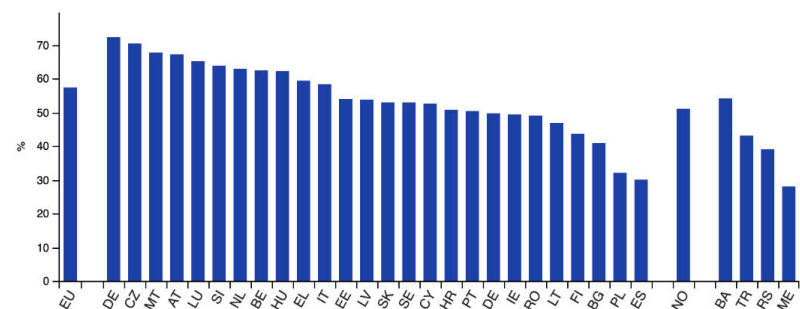


A core reason marketing becomes 'messy' in SMEs: the same person/team must cover strategy, analytics, tools, creative, and operations—often without senior guidance. Digital and ICT skills shortages amplify this.

- [Eurostat reports](#) that in 2023, 57.5% of EU enterprises that recruited or tried to recruit ICT specialists had difficulties filling those vacancies (hard-to-fill ICT vacancies).
- [OECD's Lithuania-focused digitalisation analysis](#) notes that around 60% of Lithuanian enterprises that tried to recruit ICT specialists reported difficulties filling those vacancies (for 2020, above EU average).

CEO implication: If digital talent is scarce, 'outsourcing execution' does not solve the leadership problem. You still need someone senior to decide what to do, what to stop, and how to measure impact across channels and partners.

Enterprises that had hard-to-fill vacancies for ICT specialists 2023 (% of enterprises that recruited/tried to recruit)



Note: data for France not included due to low reliability

Break in the time series: Sweden

Source: Eurostat (online data code: isoc_ske_itrctrs)

eurostat

6. When CEOs buy fractional CMO services (buying triggers)

- Growth stalls or becomes unpredictable
- Customer acquisition costs rise and ROI becomes unclear
- You have marketing activity (team/ agency) but no strategic prioritisation, positioning clarity, or performance governance.
- A high-stakes event increases risk: new market entry/export push, product launch, repositioning, turnaround.
- You need speed: you cannot wait months to hire, onboard, and iterate with a full-time executive.



Global evidence connecting to these triggers: marketing leaders report increasing CEO/CFO scrutiny over marketing value ([The CMO Survey, 2025](#)) and CEOs/CFOs often rate marketing leadership below expectations ([Gartner, 2025](#)).

7. What CEOs are actually buying

- **Control:** a clear operating system (priorities, cadence, KPIs) so marketing stops being a black box.
- **Speed:** senior decisions in weeks, not quarters; faster traction than recruiting a full-time leader.
- **Confidence:** experienced judgement for go-to-market bets; reduced risk of wasted spend.
- **Efficiency:** pay for leadership impact without full-time overhead; better use of agencies and internal staff.
- **Optionality:** the ability to test and switch senior marketing leadership as business needs change; low-risk fit discovery, especially when working through an fCMO agency.



Why this works ***(and why CEOs feel this benefit)***



This point captures something CEOs intuitively value but rarely see articulated:

- They are **not locked in** to a long, expensive executive hire.
- They can **change the skill set** as the business evolves (e.g. Go-to-market → Business growth programme → brand strengthening → upholding marketing efficiency).
- If one fCMO is “good but not perfect”, switching is **socially and contractually easy**.

An fCMO agency makes this even safer by:

- providing continuity,
- offering replacement without restarting from zero,
- reducing dependency on one individual.

(„[Fractional Capital](#)“, 2024)

8. Market maturity: what the Baltics & Poland can expect (next 3-5 years)

Based on EU Digital Decade trajectories and the global 'prove marketing value' pressure pattern, the most likely near-term evolution in our region is:

- More SMEs will reach 'basic' digital adoption, but CEOs will still struggle to translate tools into predictable growth. This increases demand for leadership, not more tools.
- Fractional and interim leadership will become a normal procurement category, starting with tech, export-oriented firms, and services businesses that already buy external expertise.
- Proof standards will rise: CEOs will increasingly expect marketing to report on pipeline contribution and unit economics (cost per qualified lead, CAC, payback), not just activity metrics.



9. Why supply is growing: CMO career shift and motivations

This section matters to CEOs because a growing supply of senior marketers choosing portfolio/fractional work increases your access to experienced leadership without full-time hiring friction.

Evidence signals:

- Marketing leaders report rising pressure from CEOs/CFOs/boards to demonstrate financial impact (The CMO Survey, 2025), which often accelerates role churn and alternative career choices.

The CMO Survey

“Demonstrating the impact of marketing actions” remains the #1 top challenge while “focusing data and analytics on the most important marketing problems” has risen to #2

Which activities does your senior marketing leader find challenging to implement on a regular basis?

	Activity	2023	2025	% change	
Most Pressing Challenge	Demonstrating the impact of marketing actions on financial outcomes	61.2%	64.0%	+4.6%	Fastest-Growing Challenge
	Focusing data and analytics on the most important marketing problems	41.6%	51.8%	+24.5%	
	Linking marketing investments to important business objectives	45.3%	41.2%	-9.1%	
	Leveraging technology to improve customer value	40.7%	37.7%	-7.4%	
Emerging Priority	Communicating the role of the brand in business decisions	36.9%	37.3%	+1.2%	
	Securing cross-functional support for new marketing investments	28.0%	34.6%	+23.6%	
	Infusing customer's point of view in business decisions	26.2%	24.1%	-8.0%	
	Using business terminology that resonates outside of the marketing function	15.4%	12.7%	-17.5%	

2025

30

The CMO Survey

Top marketing challenges across sectors

- Marketing budgets are constrained in many organisations ([Gartner CMO Spend Survey, 2025](#)), pushing leaders to look for higher-control environments where they can implement change with clearer mandates.
- Australia's interim executive market is tracked via [a long-running annual survey](#), indicating an established parallel career model for executives (Watermark Search, 2025).
- [PwC's research](#) highlights talent attraction/retention as a major challenge CEOs (PwC Pulse Survey, Oct 2024), consistent with broader shifts toward flexible work and portfolio careers (portfolio careers are a career model in which a professional or executive does not work full-time for a single company, but instead performs multiple professional roles simultaneously across different organisations).

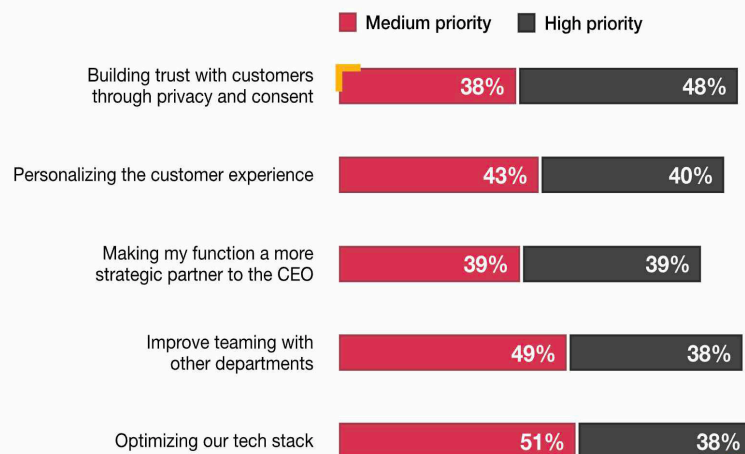


10. CEO checklist: how to evaluate whether you need an fCMO now

- You spend money on marketing every month, but cannot clearly explain which activities drive pipeline/revenue (beyond last-click anecdotes).
- Your team/agency is busy, but priorities change weekly and reporting feels like a set of disconnected metrics.

Insight for business leaders: marketing priorities are increasingly focused on optimising the technology foundation, managing customer data and privacy, and personalising customer experience. This indicates that marketing is becoming a technology- and data-driven management function that requires strategic leadership, not merely campaign execution.

A look at the CMO's top priorities



*Note: Showing 5 choices out of 8 options.
Q. To what extent is each of the following a priority for your function?
Source: PwC Pulse Survey, June 11, 2024 base of 673, CMO base of 80

- Sales complains about lead quality, and there is no shared definition of what is a lead in terms of marketing and in terms of sales.
- You are entering a new market or launching/repositioning something and the risk of a weak go-to-market plan is high.
- You want a senior leader who will set direction and accountability, not just deliver advice.
- You want to modernize your marketing stack (tools and data), launch or scale e-commerce, and select and onboard AI tools that actually improve efficiency and decision-making.

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About the author



Aurimas Guoga is a fractional CMO and advisor working with small and medium-sized as well as growth-stage companies in the Baltics and Poland. His work focuses on diagnosing and fixing fragmented marketing systems, go-to-market strategy, and closing the leadership gap between strategy and day-to-day marketing execution.

This report combines publicly available research with hands-on experience to help business leaders address the operational and strategic challenges described in the analysis.

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