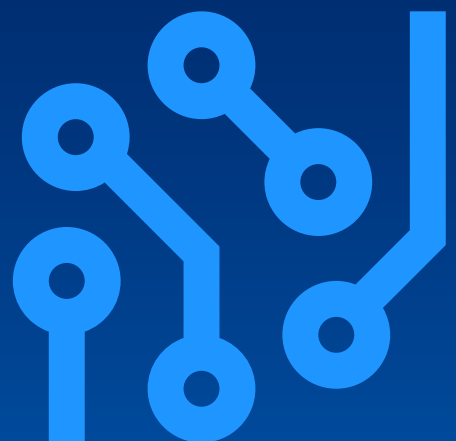


Gartner Insights

2026 Trends in Communications Budgets: Prioritize AI & Analytics Transformation



2026 Trends in Communications Budgets: Prioritize AI & Analytics Transformation

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Initiatives: Financial; CxO Leadership

Gartner's 2026 CCO Spend Survey data shows that Communications is shifting resourcing to PR, AI and analytics to enable more data- and tech-driven impact and address the challenges of a larger business transformation. This research empowers CCOs to optimize resources and justify strategic investments.

Insights at a Glance

What You Should Know

- Nearly half of Communications leaders face budget cuts and resource constraints, forcing chief Communications officers (CCOs) to self-fund investments to evolve their functions. Functions that fail to align to a larger AI- and analytics-driven business transformation risk further budget cuts.
- Increased spending on AI and technology, PR, and measurement are being offset by decreases in funding in other areas, such as events, creative, and translation.
- Technology leads expected budget increases, reflecting CCOs' commitment to building more sophisticated commstech stacks for greater efficiency and stakeholder engagement amid AI disruption.
- PR, brand, and crisis communications are receiving increased budget focus, as CCOs confront an elevated reputation risk and complexity, driven by AI, the spread of misinformation, and geopolitical uncertainty.
- Generative AI (GenAI) investment is rising, but progress is slowed by talent gaps and stakeholder skepticism. This is forcing CCOs to consider not just how much to invest, but also how to track investment impact.

What You Should Do

- Prioritize AI and analytics investments that will boost productivity and data-driven decision making.
- Refine PR and external communications strategies to maximize reputational impact, answer engine optimization (AEO) and stakeholder trust in the current reputation risk landscape.
- Protect crisis communications resources to help the organization manage the increased complexity and speed resulting from AI-driven transformation. Ensure to conduct regular audits, provide executive training, implement advanced monitoring, and update playbooks.
- Streamline, delegate or sunset activities that don't clearly align to Communications' business-outcomes-focused value proposition.

Issue Context

CCOs are under mounting pressure to support fast-moving business transformation amid persistent budget constraints. As organizations face rapid AI adoption, shifting stakeholder expectations and low trust, CCOs must reallocate spend to fund functional activities that are critical to the enterprise's transformation success. Otherwise, they risk losing additional budget to organizational cost-cutting efforts.

CCOs must balance the need to support core business objectives with the imperative to modernize their function – requiring difficult choices about where to invest limited resources. Benchmarking current budget allocations and planned investment trends is essential for leaders seeking to optimize spend, build future-ready capabilities in AI and analytics, and position their functions as critical drivers of business transformation.

Impact Brief

Communications budgets are shifting to support reputation, AI transformation and analytics. This reallocation of spending amid budget pressures requires new skills, robust measurement and ongoing benchmarking to justify investments. Functions that proactively adapt their spend and capabilities will be better-positioned to enable broader transformation efforts, demonstrate their impact, respond to emerging risks, and align with rapidly evolving stakeholder expectations.

More Detail

Gartner's top 2026 CCO Spend Survey findings are:

- Finding 1: CCO Strategic Ambitions Stymied by Budget Challenges

- Finding 2: Very Modest Budget Growth for Smaller Organizations, With Most Companies Spending Just ~0.5% of Revenue on Comms
- Finding 3: CCOs Signal Growing Increase in Technology vs. Salary and Agency Spend
- Finding 4: Budget Allocations Prioritize PR and Brand for Maximum External Impact
- Finding 5: Internal Comms Investment Increases, but Needs to be Sustained to Support AI Transformation
- Finding 6: CCOs Increase Spend on Data and Measurement, but Must Do More
- Finding 7: GenAI Spend Below 2025 Predictions, but Still on the Rise Despite Value, Skepticism and Anxiety Challenges

For an analysis of Communications structures and staffing benchmarks, refer to: 2026 Trends in Comms Structure and Staffing: New AI and Data Roles Driving Decision Making.

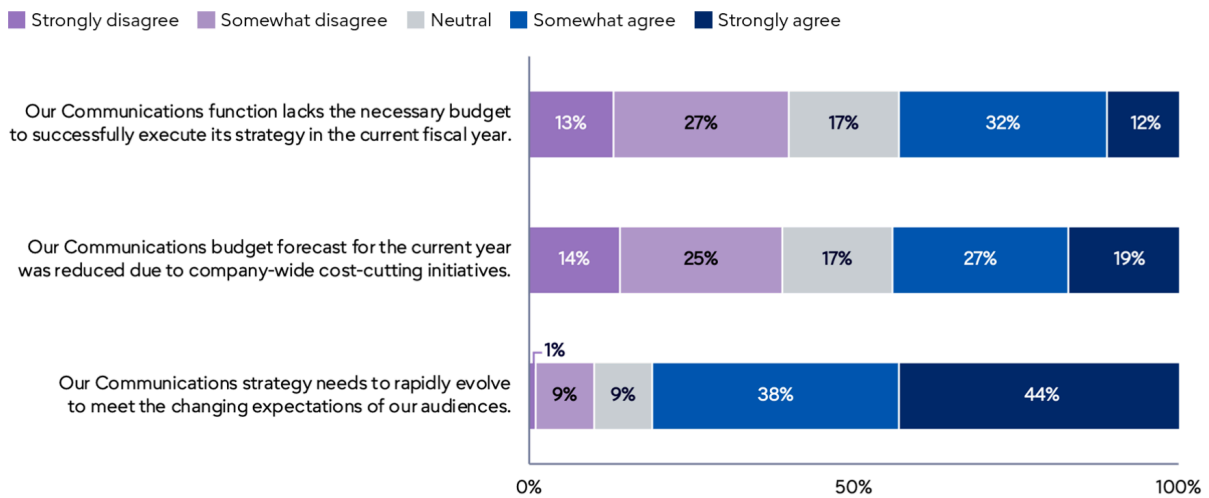
Finding 1: CCO Strategic Ambitions Stymied by Budget Challenges

Despite a strong consensus among Communications leaders that their strategies must rapidly evolve to meet shifting audience expectations, they continue to struggle to resource those strategies (see Figure 1). ¹ Nearly half of leaders (46%) report reductions in their budget due to companywide cost cutting initiatives, and a similar number (44%) report their function lacks the necessary budget to execute their strategy successfully. ¹

Figure 1: Comms Leaders' Thoughts on Budget and Strategy

Comms Leaders' Thoughts on Budget and Strategy

Percentage of respondents



n = 200; Communications leaders. Base size varies by statement.
 Q: Please rate your agreement with the following statement related to your Comms budget and strategy
 Source: 2026 Gartner CCO Spend Survey, conducted October through December 2025 among 200 Communications leaders in North America and Europe. The survey was fielded through an independent third-party research provider 847579



- CCOs are operating in an environment of broader enterprisewide financial conservatism, where cost optimization is a top priority for CFOs amid economic uncertainty.² At the same time, as CEOs prioritize growth and AI-driven transformation,³ limited resources will likely be consistently diverted to support these initiatives. This tightening budget outlook then results in a persistent gap between CCOs' strategic ambition and operational capacity. It can inhibit Communications' ability to support audiences through a rapidly shifting business environment, ultimately undermining its value to the organization. Communications leaders must be more flexible in their approach to budget planning, ensuring it reflects the strategic direction of their organizations and supports their most critical functional priorities.

Recommended Actions:

- Stop planning budgets based on incremental changes from the previous year and redraw allocations that reflect your most current critical priorities. Then, ensure you revise in-year budgets, based on a rapidly changing risk environment, to strengthen comms' position as a bulwark to reputation risk. Cut low-value work that doesn't directly support business objectives.

- Where possible, stop, streamline or offload activities to AI or other business teams, such as event management, graphics and creative services, and translation, to redirect limited resources toward transformative capabilities, particularly AI and data analytics. If you have these services embedded in the team, your service-level agreement must reflect that they are limited to strategic campaigns.

Finding 2: Very Modest Budget Growth for Smaller Organizations, With Most Companies Spending Just ~0.5% of Revenue on Comms

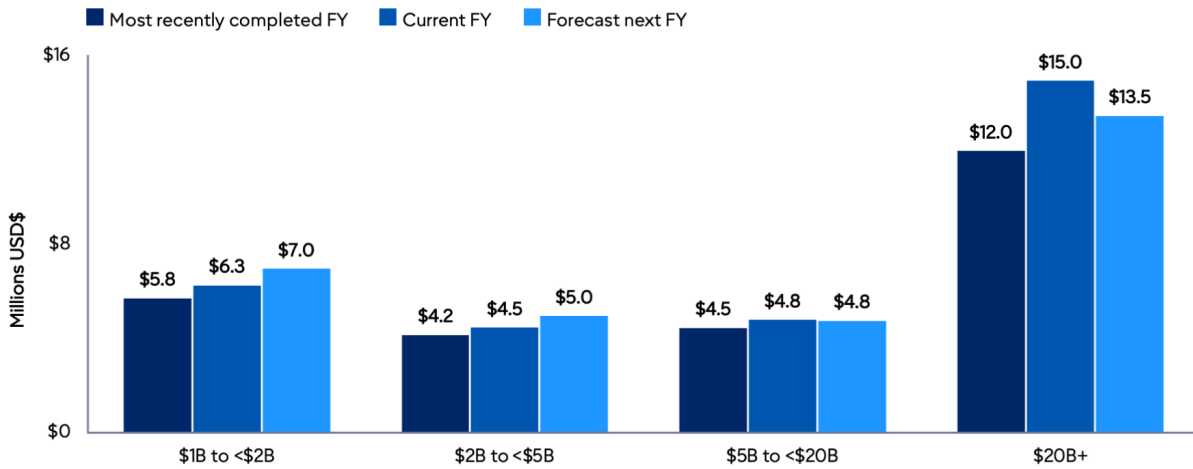
2026 data shows that only Communications functions at organizations with revenue of less than \$5 billion will see a modest increase in their budgets in the next fiscal year (see Figure 2).¹ Larger organizations will experience either stagnant or decreasing budgets, compounding CCOs' anxiety about resource availability in support of their strategies.

It's also notable that Communications functions at very large organizations (\$20 billion and up) experienced a significant 25% budget bump between the previous and current year, which doesn't seem to be fully sustained going forward. Such a stark one-off investment could be triggered by technology investments, increased risk due to global visibility and AI-related reputation threats, and rising stakeholder complexity. Very large organizations might also be quicker to recognize the functions' growing strategic importance in this environment and have the flexibility to immediately increase funding.

Figure 2: Total Comms Budget

Total Comms Budget

Median budget by annual revenue



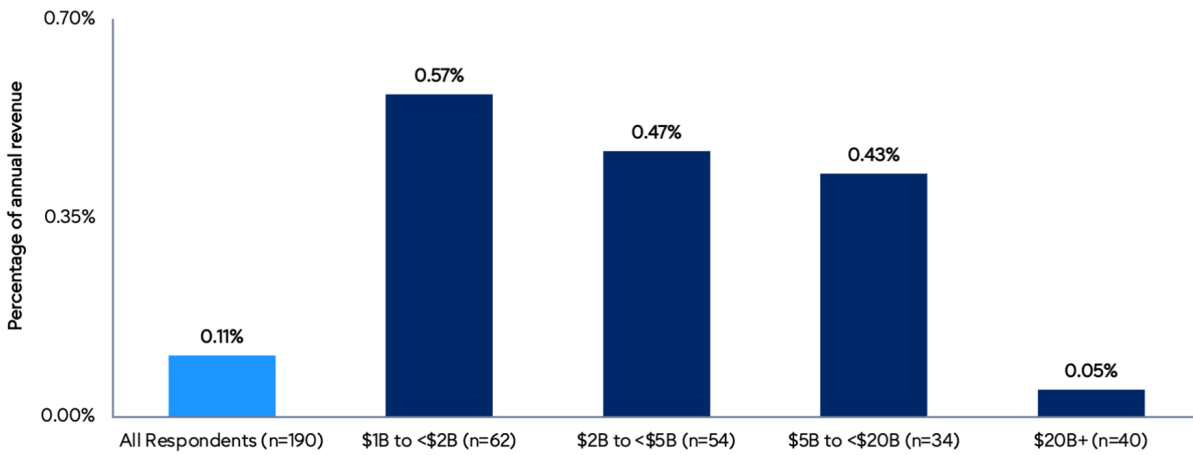
n = 190 Communications leaders. Base size varies by company size.
 Q: Now please tell us your Communications budget for the following timescales.
 Source: 2026 Gartner CCO Spend Survey, conducted October through December 2025 among 200 Communications leaders in North America and Europe.
 The survey was fielded through an independent third-party research provider
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Overall, most organizations spend around 0.5% of their revenue on communications, with smaller companies allocating a higher percentage, likely due to larger organizations having already achieved economies of scale (see Figure 3).¹ Many smaller organizations also have less-mature Communications functions, which need additional upfront investment to build their teams and infrastructure.

Figure 3: Current FY Comms Budgets by Company Size

Current FY Comms Budget By Company Size
 Mean budget by annual revenue



n = 190 Communications leaders. Base size varies by company size
 Q: What is your company's current enterprise-wide annual revenue for the current fiscal year; Now please tell us your Communications budget for the following timescales.
 Source: 2026 Gartner CCO Spend Survey, conducted October through December 2025 among 200 Communications leaders in North America and Europe. The survey was fielded through an independent third-party research provider 847579



CCOs need to accept that supporting the transformation of Communications and the broader business will require tough trade-offs around existing budgets, rather than planning for incremental change or hoping for significant increases.

Recommended Actions:

- Proactively advocate for investment to your CEO and CFO by linking Communications outcomes to enterprise priorities such as reputation, engagement, and trust. Communicate the function’s value proposition to reflect its impact on business transformation and facilitate these conversations.
- Prioritize more spending on transformative initiatives, such as building AI and data and analytics, instead of continuing to fund traditional capabilities at the same levels.

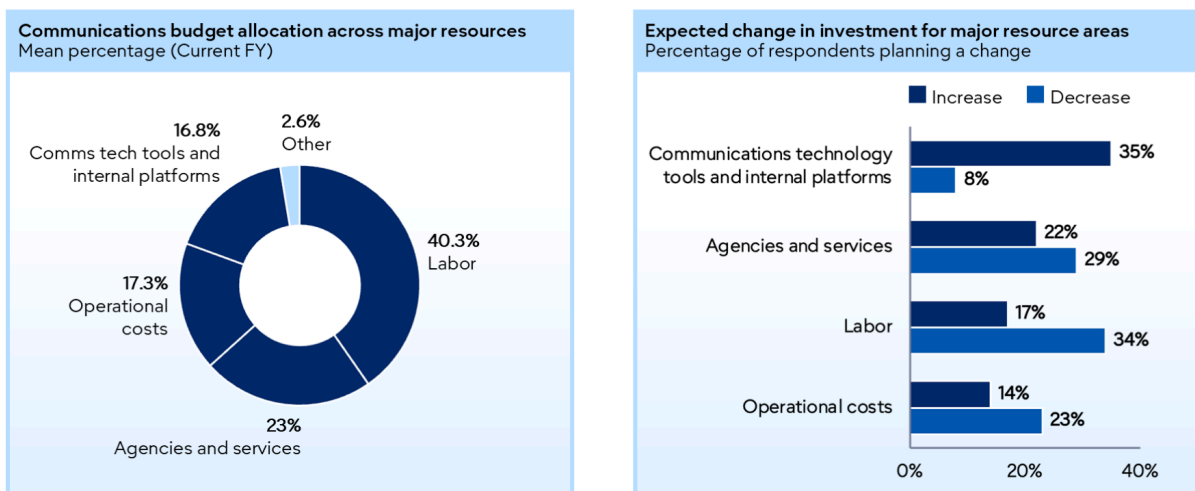
- For larger organizations, evaluate whether current budget allocations are adequate to support Communications’ evolving priorities, especially in areas like technology, measurement and talent development.
- All organizations should regularly benchmark Communications spend against peers and industry standards to inform resource reallocation and justify investments in core capabilities.

Finding 3: CCOs Signal Growing Increase in Technology Versus Salary and Agency Spend

Communications budgets remain heavily weighted toward traditional spend areas, with labor, agencies and services, and operational costs comprising the majority of current allocations, while technology tools and internal platforms accounts for 17% of budgets (see Figure 4).

Figure 4: CCOs Prioritize Technology Investment Over Traditional Spend Areas

CCOs Prioritize Technology Investment Over Traditional Spend Areas



n = 200 Communications leaders, excludes don't knows
 Q: How is your current fiscal year's total Communications budget being allocated to or spent on each of the following major resource categories and what do you expect the budget allocation to look like in the next fiscal year?
 Source: 2026 Gartner CCO Spend Survey, conducted October through December 2025 among 200 Communications leaders in North America and Europe. The survey was fielded through an independent third-party research provider 847579

However, looking to the next fiscal year, 35% of Communications leaders expect to increase spending on technology – outpacing anticipated increases in the three other key areas. Notably, a significant proportion of leaders also anticipate reductions in labor, agencies/services, and operational costs, signaling a reallocation of resources toward digital transformation. ¹

Communications leaders must proceed with caution here, given that nearly half (44%) of them report that their GenAI investments have not yet delivered the expected value.¹ Many CCOs haven't yet developed a comprehensive business-focused technology strategy that puts together a coherent outlook of tech, vendor and talent capabilities. Without such a strategy, rushing to invest in AI at the expense of labor costs, for example, might result in future talent shortages and AI tools that lack the human expertise and guidance to deliver return on investment. Shifts in resourcing need to be guided by a long-term vision of the function's strategic positioning as an AI-driven enterprise, rather than disjointed investments in the trend of the day.

Recommended Actions:

- Build a technology strategy that prioritizes business and communications outcomes, enabling an informed, future-looking shift toward data-driven and AI-enabled communications.
- Conduct a comprehensive audit of operational costs and legacy activities to identify opportunities for reinvestment in more impactful capabilities that set the function up for future success.
- Reevaluate agency spend to focus them on the highest-ROI activities, where they are supporting business priorities with skills that don't exist in-house.

Finding 4: Budget Allocations Prioritize PR and Brand for Maximum External Impact

To avoid further loss of stakeholder trust, CCOs must defend and shape reputation and brand in an environment that demands foresight and speed. We see this need reflected in budgets, with PR and corporate brand commanding the largest shares of Communications budgets (see Figure 5).

Figure 5: Communications Budget by Area

Communications Budget by Area
Percentage of respondents

External activity				Internal activity		Miscellaneous activity	
14.3% Public relations	6.2% External social media	4.8% Crisis comms	4.5% Corporate sponsorship	7.2% Employee comms		4.4% Graphics and creative services	4.2% Executive comms
	4% Public website	3.4% Government affairs	2.8% Influencer partnerships	3.8% Change comms	3.4% Manager/leader comms	4.1% Measurement, monitoring and analytics	3.9% Event management
8.8% Corporate brand	3.8% Community relations	3.3% CSR/ESG	2.2% Investor relations	3.3% Intranet	1.9% Workplace messenger apps	3.4% Comms staff development	
			1.4% Financial reporting			0.9% Translation	
0.1% Other							

n = 200 Communications leaders
 Q: How is your current fiscal year total Communications budget being allocated to or spent on each of the following areas?
 Source: 2026 Gartner CCO Spend Survey, conducted October through December 2025 among 200 Communications leaders in North America and Europe. The survey was fielded through an independent third-party research provider 847579

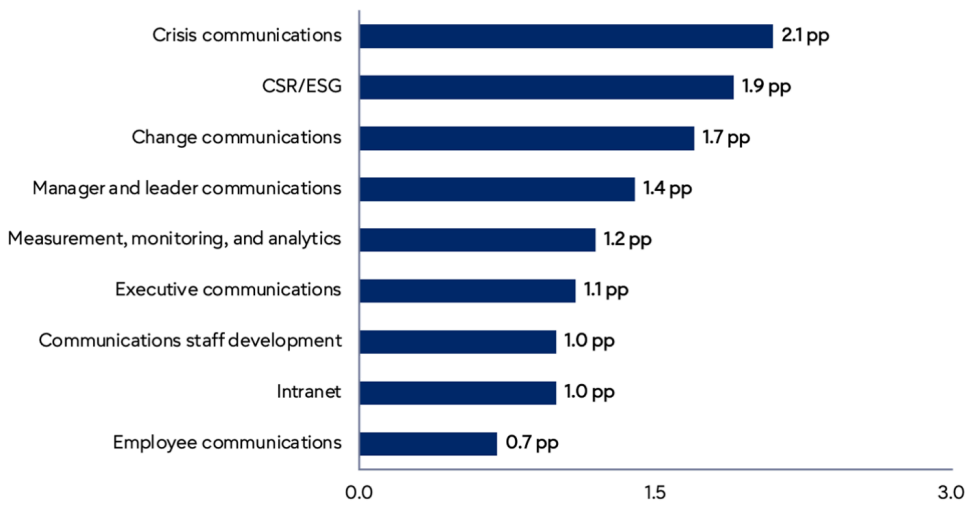


CCOs are also increasingly aware of new emerging risks, as crisis communications saw the largest single increase of 2.1 percentage points since the previous fiscal year, bringing it up to 4.8% of total current budget (see Figure 6).^{1,2} This shift underscores the growing imperative for Communications to not only respond to, but anticipate and work to prevent, high-impact and potentially reputation-damaging events. This is fueled by a landscape characterized by heightened stakeholder scrutiny, regulatory complexity, and the rapid AI-driven amplification of disinformation and misinformation. CCOs need to be cautious, however, that their crisis communications work is impactful and aligned to CEO risk imperatives, rather than defaulting to constant tactical firefighting that distracts from their long-term strategic priorities.

Figure 6: YoY Budget Change by Comms Area

YoY Budget Change by Comms Area

Percentage point (pp) increase over last FY shown



n = 200 Communications leaders

Q: How is your current fiscal year total Communications budget being allocated to or spent on each of the following areas?

Source: 2026 Gartner CCO Spend Survey, conducted October through December 2025 among 200 Communications leaders in North America and Europe.

The survey was fielded through an independent third-party research provider

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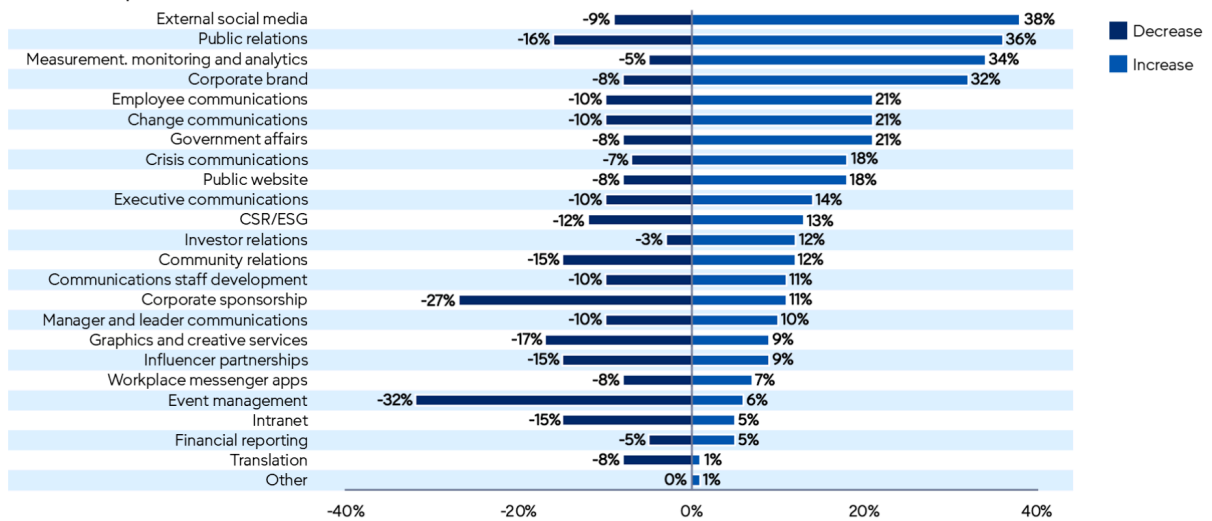


Looking ahead, the largest planned budget increases are in external social media and PR, signaling a clear intent among Communications leaders to amplify their organizations' visibility and influence across digital and earned media channels (see Figure 7).¹ In addition, the rapid proliferation of public large language models (LLMs) is fundamentally reshaping how audiences discover and trust information, forcing organizations to recalibrate PR and earned media strategies to sustain visibility and influence in AI-mediated environments.

Figure 7: Comms Areas Targeted for Largest Budget Change

Comms Areas Targeted For Largest Budget Change

Sum of top 5 rank



n = 190 Communications leaders with planned changes to investments in communication areas
 Q: In which of the following areas do you plan to increase/decrease spend the most over the next fiscal year?
 Source: 2026 Gartner CCO Spend Survey, conducted October through December 2025 among 200 Communications leaders in North America and Europe.
 The survey was fielded through an independent third-party research provider
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Recommended Actions:

- Prioritize investments in PR and earned media that will support strong answer engine visibility. Make the business case to cross-functional partners in marketing to reallocate at least some spending from paid media to owned and earned media, ensuring visibility in the new search reality.
- Direct budget toward combating misinformation and shaping audience perceptions by investing in authoritative owned content, community engagement, and monitoring tools that build trust and drive measurable changes in audience behavior.
- Update and reactivate your corporate narrative to support consistent representation of your organization across traditional, social, and owned media, prioritizing budget allocations that maximize reputational impact and stakeholder trust in a rapidly evolving media landscape.

- Prioritize investment in end-to-end crisis preparedness by conducting regular audits, implementing advanced monitoring tools, delivering executive training, and maintaining up-to-date crisis playbooks.

Finding 5: Internal Comms Investment Increases, but Needs to Be Sustained to Support AI Transformation

While external communications spending still accounts for the majority of the Communications budget, investment in internal communications is growing. Employee communications, for example, is the third-largest budget allocation for CCOs, reflecting its foundational role in organizational alignment and culture (see Figure 5).¹ But while there is an upward trend recognizing employee communications' value in driving engagement, trust, and advocacy, its anticipated budget increase in the next fiscal year is modest compared to external-facing activities (see Figure 7). Spend on change communications and manager and leader communications has also grown quite modestly from 1.7% and 1.4%, respectively. Given that 69% of Communications leaders cite employee anxiety from changes such as AI transformation as a significant risk to enterprise success over the next two years, CCOs need to reevaluate whether their planned investment to support employees and change management will be sufficient.¹

Recommended Actions:

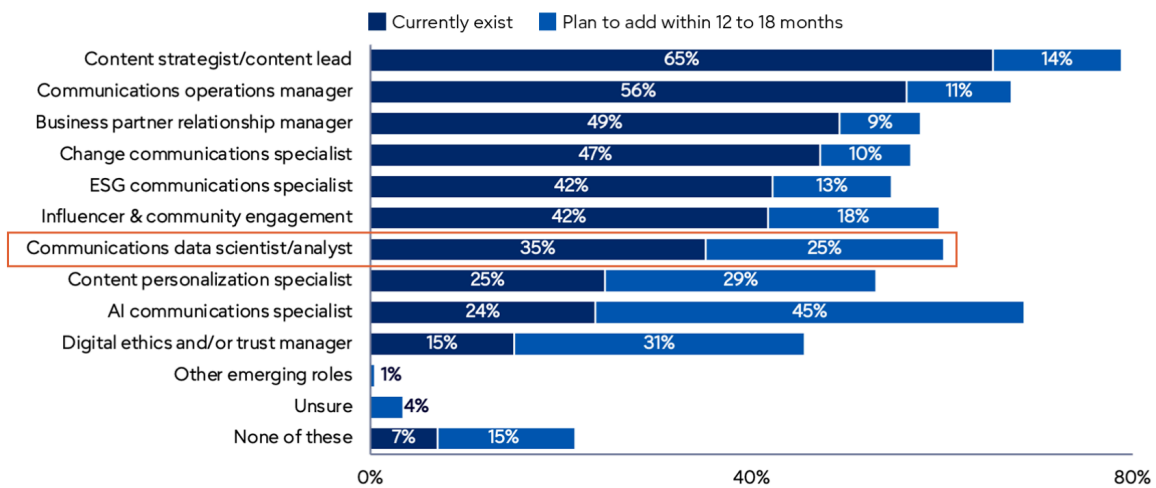
- Bolster your ability to support critical change communications by prioritizing budget allocation for advanced intranet and employee experience platforms, ensuring investments drive personalized, efficient, and engaging communications for all workforce segments.
- Allocate resources to regularly measure the effectiveness of employee communications, using data-driven insights to optimize spend across content, channels, and engagement strategies for maximum impact.

Finding 6: CCOs Increase Spend on Data and Measurement, but Must Do More

Data and analytics is emerging as another top investment priority for Communications, with 34% of leaders planning to increase spend there – making it the third-largest category for planned budget growth (see Figure 5).¹ Investment is also growing in specialized data and analytics roles. Thirty-five percent of Communications leaders report that they already have a dedicated data scientist or analyst, and another 25% plan to add one within the next 12 to 18 months (see Figure 8).¹

Figure 8: Emerging Roles in the Communications Function: Existing vs. Planned

Emerging Roles in the Communications Function: Existing vs. Planned Percentage of respondents



n = 199 Communications leaders
 Q: Which of the following dedicated emerging roles (or equivalent roles) currently exist within the Communications function and which do you plan to add within the next 12 to 18 months?
 Source: 2026 Gartner CCO Spend Survey, conducted October through December 2025 among 200 Communications leaders in North America and Europe.
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Despite this momentum, actual budget allocation for measurement and analytics has only grown from 2.9% to 4.1% over the past year – well behind marketing, for example, which commits 8%.^{1,4,5} The size of this gap speaks to the widespread challenge of the function’s ability to link its work to organizational outcomes. Communications is beginning a much-needed evolution away from overlooking the importance of measurement. However, CCOs need to continue to increase investment if they want to sustainably elevate their functions’ status to business partners who are able to inform transformation processes with data-driven insights and trends.

Recommended Actions:

- Invest in assessing and developing your team's measurement and analytics capabilities to better quantify and communicate Communications' value to executive leadership. That will also help the team add more value to transformation efforts by providing data-driven recommendations.
- Establish a clear Communications budget target dedicated to analytics and measurement, using other functions' and industry benchmarks to support resource requests.
- Build in-house analytics expertise by hiring or upskilling communications data scientists and analysts, ensuring your team can deliver actionable insights and strategic guidance.
- Embed analytics across all Communications activities – from planning to evaluation to continuously optimize strategy and demonstrate measurable business impact.

Finding 7: GenAI Spend Below 2025 Predictions, but Still on the Rise Despite Value, Skepticism and Anxiety Challenges

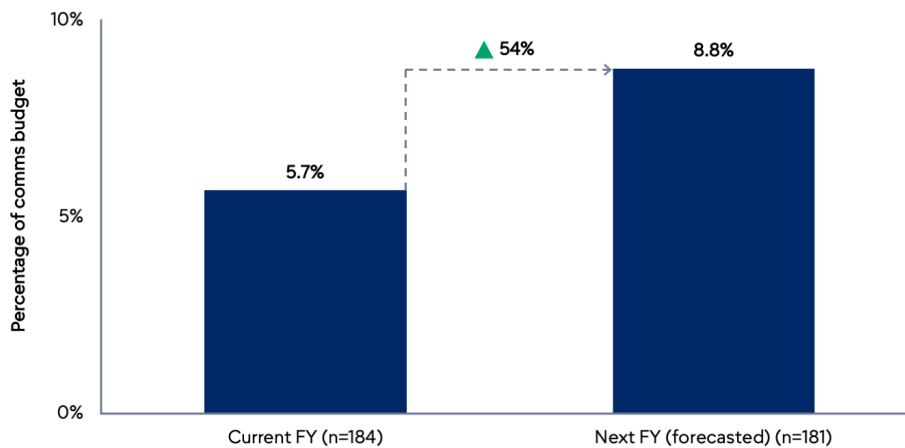
Communications investment in GenAI is on the rise, with current budget allocation of 5.7% of total budget, increasing to a projected 8.8% next fiscal year – a 54% year-over-year increase (see Figure 9). ¹

This investment is well-placed not just in supporting CEOs' AI-related priorities, but in protecting the Communications value proposition in the current environment of rapid transformation. AI disruption impacts many of the tactical activities that used to be at the core of the function's value-add. Thus, CCOs need a well-funded AI strategy that allows the rebalancing of communications activities to allow communicators to take on more strategic, differentiated work.

Figure 9: Change in Communications Budget Allocated to GenAI

Change in Communications Budget Allocated to GenAI

Mean percentages



n = 181-184 Communications leaders. Base size varies by year.

Q: What percentage of your total Communications budget is being allocated to Generative AI (GenAI) spending in the current fiscal year and what do you expect it to be in the next fiscal year?

Source: 2026 Gartner CCO Spend Survey, conducted October through December 2025 among 200 Communications leaders in North America and Europe.

The survey was fielded through an independent third-party research provider
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However, this growth lags behind last year's expectations, which anticipated a 7.8% allocation for the current year, signaling that adoption is progressing more slowly than forecast. ¹ Several factors contribute to this tempered pace. For example, 86% of Communications leaders recognize the need to update team talent strategies and skill sets to fully capitalize on GenAI opportunities. Additionally, 57% believe the function must address substantial audience skepticism about GenAI integration in communications work. As a result, nearly half (43%) of Communications leaders report that their GenAI investments have not yet delivered the expected value. ¹ This is why CCOs must prioritize investment in AI use cases that align to the business objectives of a comprehensive technology strategy that factors in the talent needed to support implementation.

Recommended Actions:

- Proactively redefine Communications' value proposition and reeducate stakeholders on how the function creates differentiated value from AI.
- Prioritize targeted investments in GenAI that align with strategic Communications objectives, demonstrate clear business value and are feasible.

- Invest in upskilling and reskilling the Communications team alongside technology investment to fully realize GenAI's potential.
- Establish clear success metrics for GenAI initiatives and continuously monitor outcomes, shifting resources to the highest-impact use cases that advance business transformation goals.

Evidence

¹ **2026 Gartner CCO Spend Survey.** This survey aimed to understand how chief Communications officers (CCOs) allocate Communications budgets and resources, including workforce and agencies. It was conducted online from late October through mid-December 2025. In total, 200 respondents were surveyed across North America (n = 119) and Europe (n = 81). Qualifying organizations reported enterprisewide annual revenue for fiscal 2025 of at least \$1 billion, with 32% of the respondents coming from organizations with \$10 billion or more in annual revenue. The respondents came from a variety of industries: financial services (including insurance) (n = 60), manufacturing (n = 37), healthcare (n = 32), and other industries (n = 71). All the respondents were required to be senior decision makers in the Communications function, where they held significant responsibilities in developing and approving the organization's Communications budget and strategy. Ninety-three percent of the respondents had both internal and external communications under the purview of their Communications function. Disclaimer: The results of this survey do not represent global findings or the market as a whole but reflect the sentiments of the respondents and companies surveyed.

² **2026 Gartner Finance Priorities Poll.** This poll was conducted to help CFOs understand finance function priorities for the second half of 2025 and get a head start on 2026 planning. The survey was conducted online from June through August 2025 among 102 CFOs. Disclaimer: The results of this poll do not represent global findings or the market as a whole, but reflect the sentiments of the respondents and companies surveyed.

³ **2026 Gartner CEO and Senior Business Executive Survey.** This survey was conducted to examine CEO and senior business executive views on current business issues and areas of technology impact. 469 actively employed CEOs and other senior business executives participated in the survey that was conducted across three quarters in 2025 – March-April, May-June, and October-November. CEOs (n = 330), CFOs (n = 100), COOs or other C-level executives (n = 16), and chairs, presidents or board directors (n = 19) from North America (n = 186), Europe (n = 147), Asia/Pacific, excluding China (n = 99), Latin America (n = 22), the Middle East (n = 11) and South Africa (n = 4) and organization of various sizes (\$50 million to less than \$250 million, n = 43, \$250 million to less than \$1 billion, n = 102, \$1 billion to less than \$10 billion, n = 213 and \$10 billion or more, n = 111) participated in the survey. Survey results reflect open-ended responses categorized using an LLM-based topic modeling that was updated in 2025. As such, results are not directly comparable to previously published research. Disclaimer: Results of this survey do not represent global findings or the market as a whole but reflect the sentiments of the respondents and companies surveyed.


⁴ **2025 Gartner CCO Spend Survey.** This survey aimed to understand how chief Communications officers (CCOs) allocate Communications budgets and resources, including workforce and agencies. It was conducted online from November through mid-December 2024. In total, 169 respondents were surveyed across North America (n = 122) and Europe (n = 47). Qualifying organizations reported enterprisewide annual revenue for fiscal 2024 of at least \$100 million, with 72% of the respondents coming from organizations with \$1 billion or more in annual revenue. The respondents came from a variety of industries: financial services (n = 40), manufacturing (n = 32), healthcare (n = 28), pharmaceuticals (n = 26), utilities (n = 16), business services (n = 16), and government and other industries (n = 11). All the respondents were required to be senior decision makers in the Communications function, where they held significant responsibilities in developing and approving the organization's Communications budget and strategy. Eighty-eight percent of the respondents had both internal and external communications under the purview of their Communications function. Disclaimer: The results of this survey do not represent global findings or the market as a whole but reflect the sentiments of the respondents and companies surveyed.

⁵ **2025 Gartner CMO Spend Survey.** This survey explored top-line marketing budgets with the goal of understanding how changing customer journeys, pressures from the C-suite and cost challenges affect marketing's spending priorities and channel effectiveness. Conducted online from January through March 2025, the research included 402 respondents from North America (n = 202), the United Kingdom (n = 97) and Europe (n = 103; including France, Germany, Belgium, Denmark, Finland, Netherlands, Norway and Sweden). Participants were required to be involved in decisions related to setting or influencing marketing strategies/planning, aligning marketing budgets/resources, or leading cross-functional programs and strategies with marketing. Seventy-seven percent of the respondents represented organizations with annual revenue of \$1 billion or more. The respondents came from a diverse range of industries: manufacturing (n = 52), financial services (n = 50), insurance (n = 43), consumer products (n = 43), healthcare (n = 42), travel and hospitality (n = 37), IT and business services (n = 36), retail (n = 36), pharma (n = 32), and media (n = 31). Disclaimer: Results of this survey do not represent global findings or the market as a whole, but reflect the sentiments of the respondents and companies surveyed.

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