Forrester's 2027 Budget Planning Guides: After A Year Of Caution, Business And Tech Leaders Are Ready To Invest Again

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While leaders are betting on growth, in the age of AI, spending more is no longer enough

CAMBRIDGE, Mass.--(BUSINESS WIRE)--Jul. 15, 2026-- According to Forrester's (Nasdaq: FORR) 2027 Budget Planning Guides, business and technology leaders are approaching 2027 with renewed confidence as they increasingly accept volatility as a permanent feature of the business environment. After a year of more cautious spending, more than 80% of leaders expect their budgets to increase over the next 12 months, with as many as one-quarter anticipating growth of 10% or more. But planning in the age of AI demands more than bigger budgets: Increasing investment without modernizing operating models, strengthening data foundations, and improving AI readiness will only accelerate fragmented data, duplicated work, and technical debt. To realize AI's full potential, leaders must rethink their strategies and prioritize investments in operational foundations, governance, and experimentation that drive tangible outcomes.

This year, optimism is widespread across functions: 82% of technology decision-makers and 91% of marketers expect budget increases in 2027, while more than half (55%) of customer experience (CX) leaders anticipate spending growth of 5% or more, up from 39% a year ago. Forrester's Budget Planning Guides, based on a global survey of more than 2,600 business and technology decision-makers across industries and functions, provide data-driven spending benchmarks and practical recommendations for technology and security, B2B and B2C marketing, customer experience, digital strategy, and revenue operations leaders. The guides are designed to help organizations prioritize investments, identify opportunities to reduce spending, and evaluate where AI can create competitive advantage.

Key recommendations from Forrester's 2027 Budget Planning Guides include:

Areas to increase budget in 2027

- **Enterprise context that agents can act on.** Build machine-readable information and provide governed enterprise knowledge that enables AI agents to contextualize and navigate business policies, processes, and systems with greater accuracy.
- **Brand visibility in answer engines.** As AI-powered answer engines increasingly influence buyer decision-making, marketers must prioritize answer engine optimization (AEO) to improve brand visibility and share of voice in AI-generated results.

Areas to decrease budget in 2027

- **Tech debt that slows AI and productivity.** Instead of cutting spend across all data cleanup efforts, focus on targeted fixes that improve data quality, data accessibility, and developer or agent productivity to unlock immediate value from AI investments.
- **AI pilots that scale activity without organizational readiness.** Eliminate AI initiatives that lack governance, clear ownership, success criteria, or a defined path to scale.

Areas for experimentation in 2027

- **Synthetic data to accelerate insights generation.** Test synthetic data alongside traditional customer research to accelerate learning, improve concept testing, and establish clear guardrails for where synthetic insights can be used reliably and responsibly.
- **AI agents that enable marketing operations and customer-facing experiences.** Experiment with agentic capabilities that improve content production, audience generation, brand governance, and customer engagement.

"Business leaders are no longer planning for a return to stability — they're planning for a future where volatility is a constant," said Sharyn Leaver, chief research officer at Forrester. "The organizations that outperform in 2027 won't be those that spend the most on AI. They'll be the ones that invest in the foundations that make AI effective: trusted data, strong governance, organizational readiness, and the ability to continuously adapt as technology and customer behavior evolve."

Resources:

- Explore more Budget Planning Guides content.
- Read more about the key areas that technology, marketing, CX, and other leaders should prioritize in 2027.

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