

PRACTICAL SUPPORT FOR THE  
CMO WALKING THE LINE BETWEEN  
SHORT AND LONG-TERM GROWTH.



# THE BALANCING ACT



This report brings fresh perspective to the enduring dilemma at the heart of the CMO's role, the balancing act between short and long-term growth.

It uses AI to read everything else, so you don't have to. Enriches the findings with leading marketers' lived experiences. And shares our marketing transformation expertise to gain equilibrium.

The result is a balancing pole for marketing's high wire that practically connects all things customer across operations, tech, content, loyalty and more. Offering the CMO valuable new insight on how to create value now and for the future.

Step right up!

THE MARKETING GROWTH DILEMMA

OUR HYBRID INTELLIGENCE RESEARCH

THE DIGITAL TRANSFORMATION OPPORTUNITY

REWIRING MARKETING

TACKLING TECH

FLIPPING LOYALTY

WINNING CONTENT

BECOMING FUTURE-FIT

CONCLUSION

BIBLIOGRAPHY

P.01

P.04

P.06

P.11

P.16

P.22

P.27

P.32

P.38

P.41



# THE MARKETING GROWTH DILEMMA

Author  
**Judy Lee**  
Director  
[jtlee@deloitte.co.uk](mailto:jtlee@deloitte.co.uk)



Author  
**Andy Sandoz**  
Partner  
[asandoz@deloitte.co.uk](mailto:asandoz@deloitte.co.uk)



Contributors  
**Georgina O'Sullivan**



# Today's Chief Marketing Officers (CMOs) must perform **a complicated balancing act.**

**On one side of their scales**

is the pressure to deliver immediate, measurable returns: driving customer acquisition, increasing conversion rates, and demonstrating clear revenue impact each quarter.

**On the other side** is the strategic imperative to build sustainable brand equity, create superior customer experiences, and develop future-ready marketing capabilities. These initiatives may take years to fully realise their value, which can itself be difficult to quantify.

This paper aims to provide a practical framework for finding the equilibrium required to balance these scales, by reframing challenges, resetting systems, and exploring the various levers available to the modern CMO.

## **THE GROWTH DILEMMA, *DEFINED***

**The fundamental tension CMOs face between allocating resources to meet today's demands for measurable, immediate return on investment (ROI), versus investing to drive long-term success through building brands, delivering superior customer experiences, and evolving their teams to be future-ready. →**



The current economic environment has heightened financial scrutiny, with CEOs demanding concrete, short-term marketing returns amid broader volatility. Simultaneously, customer preferences have become increasingly divergent, requiring more sophisticated segmentation and personalisation across a complex web of micro-moments, touchpoints and channels.

The constant paradox is that those market conditions that drive calls for immediate returns are precisely those that make long-term strategic investments more crucial than ever.

Marketing leaders who truly excel understand that short-term tactics and long-term strategies are not opposing forces but complementary ones that must be balanced.

The balance between long-term brand building and short-term performance has been a cornerstone of marketing theory for more than a decade<sup>1</sup>, but several factors have intensified its complexity.

As **Dan Elton, Former Chief Customer Officer of ASOS**, describes it:

“Balancing short-term vs long-term isn’t just a marketing question; it’s a corporate strategy dilemma. It hinges on your sustainable profitability and the strategic risks you can afford.”

Today's marketing leaders must serve as brand custodians, growth strategists, customer experience architects, data analysts, and technology integrators - all while demonstrating clear business impact across multiple time horizons. Navigating this expanded remit requires a strategic approach to growth that both recognises immediate needs and sows the seeds for future opportunities.

If that sounds daunting it is important to recognise that, in many ways, this is a great time to be a CMO. While senior marketers may be facing a host of new challenges, they have more, and more powerful, tools at their disposal than has ever been the case before.

The power of AI, in particular, stands to drive game changing developments in the world of marketing ■



# OUR *HYBRID* INTELLIGENCE RESEARCH

**To better understand the challenges and opportunities facing marketing leaders, we conducted an analysis of the current landscape in which CMOs operate. We employed a robust 'hybrid intelligence' research methodology designed to capture the breadth of industry trends and the depth of real-world experience.**

**To establish a comprehensive understanding of the current marketing discourse, we first leveraged our unique generative AI capability – NavigAite™.**

This proprietary tool scanned and analysed over 50 of the most influential marketing reports published across the industry over the past two years. The objective was to move beyond anecdotes and identify significant trends, recurring challenges, and points of consensus within the global marketing community. NavigAite™ is Deloitte's customisable Generative AI solution which works with

Relativity™ using large language models (LLM) and applies Deloitte's Trustworthy AI™ framework to offer a solution for document review.

By processing vast amounts of data, identifying key themes, and mapping conceptual relationships, NavigAite™ provided a foundation of the core issues dominating the marketing agenda, which informed the structure of this report.

Data and trend analysis alone, however, cannot capture the nuance of leadership decision-making. To complement our Generative AI findings, we engaged in direct conversations with a diverse group of leading CMOs across various sectors. Our aim was to validate, challenge and enrich the Generative AI analysis with practical, on-the-ground perspectives, understanding how theoretical challenges manifest in daily operations. →



Through structured interviews and discussions with four CMOs, we gathered invaluable texture, context and real-world examples which ground the broader trends in the tangible experiences and human elements essential for success. Their perspectives are reflected in the quotes featured throughout this report.



**Marg Jobling**  
*CMO, NatWest*



**Dan Elton**  
*Former Chief Customer Officer, ASOS*



**Helen Whetton**  
*Global Brand and Marketing Director, BT*



**Ben Perkins**  
*UK CMO & Partner, Deloitte*

However, unlocking the true value of this data lies in the synthesis of these insight streams. Our team of experienced marketing strategy and transformation subject matter experts integrated these insights, cross-referencing themes and applying Deloitte’s in-depth industry knowledge. This involved interpreting the findings, structuring the narrative and developing the practical frameworks presented in the subsequent chapters.

By combining Generative AI analysis with human-centric dialogue and expert interpretation, we aim to provide

a uniquely holistic and actionable perspective – a view grounded in comprehensive analysis yet deeply informed by the leaders navigating the front lines of change.

The analysis revealed five key challenges that CMOs face when attempting to balance short- and long-term growth. These include operational challenges, strategic challenges, economic challenges, skills challenges and measurement challenges. Each of these are covered in this report ▪





# THE DIGITAL TRANSFORMATION *OPPORTUNITY*

**Each of these challenges must be viewed through the lens of a technological revolution.**

Digital transformation and the potential of AI offer a way to reset these challenges entirely, creating an environment where immediate gains can simultaneously advance strategic objectives.

When correctly implemented, digital transformation creates virtuous cycles that address both near and far time horizons.

Operational transformations unlock immediate productivity gains whilst building the marketing function of the future.

Customer-focused

transformation delivers immediate customer satisfaction whilst securing long-term loyalty and advocacy.

Enhanced data capabilities enable marketers to clearly demonstrate the relationship between today's metrics and tomorrow's strategic outcomes, dissolving the artificial boundary between short and long-term thinking.

Comprehensive data ecosystems with actionable insights empower marketing leaders to make decisions that serve both immediate and future needs.

Generative AI speeds up the development and production cycles of marketing campaigns

to allow human creatives to be used more effectively.

By leveraging digital transformation to create this integrated approach, CMOs can rise above the traditional growth dilemma. Rather than choosing between short-term tactics and long-term vision, they can identify powerful intersection points where today's actions accelerate tomorrow's strategic progress.

This approach creates shared value: delivering superior experiences for customers while generating measurable commercial returns for the organisation. →



Helen Whetton, Global Brand and Marketing Director of BT, underscores this approach:

“Identifying those early indicators of progress, those small wins, is crucial. They give us the confidence to keep going and ultimately achieve our long-term objectives.”

**THIS ‘GREAT RESET’  
TRANSFORMS WHAT  
WAS ONCE SEEN AS AN  
INEVITABLE TRADE-OFF**

**INTO A STRATEGIC  
OPPORTUNITY FOR  
ALIGNED MARKETING  
INVESTMENT THAT  
DELIVERS SUSTAINABLE  
VALUE NOW AND INTO  
THE FUTURE.**



# A CMO'S GUIDE TO ACHIEVING *EQUILIBRIUM*

Having reframed the growth dilemma through the lens of digital transformation, we can now explore a more comprehensive framework for marketing leaders.

The following five interconnected chapters represent critical domains where CMOs must develop expertise to unlock the potential of their roles.

## **REWIRING MARKETING**

Operational excellence serves as the foundation for both immediate marketing results and for strategic growth. By streamlining processes, embracing new technologies and ways of working, and fostering a change-positive culture, CMOs can simultaneously reduce costs and enhance team capacity to drive greater value.

Leading CMOs can use operational change to create centres of excellence. This can allow them to optimise agency partnerships, and to leverage GenAI to usher in a true workforce transformation. It can also see the marketing function drive company-wide improvements.

The result can be a leaner, more agile approach to innovation and customer-centricity. [\*Go to chapter\*](#)

## **TACKLING TECH**

The marketing technology (Martech) landscape continues to expand at a dizzying pace, further accelerated by the growth of AI and GenAI.

Successfully navigating this environment requires an approach to Martech investment that balances immediate tactical needs with strategic long-term vision. The key opportunities for CMOs lie in their abilities to break down silos to allow marketers to access the technology they need, now and for the future.

A collaborative and data-driven culture, working with other departments, will allow all to contribute more effectively to the success of organisations. [\*Go to chapter\*](#)

## **FLIPPING LOYALTY**

In an era of increasing competition and information saturation, brand loyalty represents both immediate competitive advantage and long-term business value.

Successful organisations are those that prioritise loyalty to their customers, rather than expecting to drive customer loyalty to the brand. By consistently meeting customer needs and delivering on brand promises across all touchpoints, brands can build strong, lasting relationships with customers and drive sustainable growth over the long term. [\*Go to chapter\*](#)

## **WINNING CONTENT**

Heightened demand for personalised experiences and the proliferation of media channels places an outsize demand for content on marketers. However, while the quantities demanded increase exponentially, the ability of marketers to create quality content that can cut through from the competition is being tested.

To succeed, marketers must take ownership of their content strategy, understand their customers, experiment with new formats and embrace GenAI technologies, prioritise data-driven decision-making, and invest in their teams' skills.

With marketers as the architects, these building blocks can be used to create content

that delivers measurable value for both customers and businesses, now and in the future. [\*Go to chapter\*](#)

## **BECOMING FUTURE-FIT**

Future CMOs need to be multifaceted leaders, blending technological expertise with creative prowess. Successful CMOs will be catalysts for change, smart operators, and experience orchestrators. To address skill gaps, CMOs should embrace new leadership styles now, build strategic partnerships, and engage in continuous learning. Ultimately, the CMO of the future is a marketing polymath, navigating the evolving marketing landscape and shaping the future of brands. [\*Go to chapter\*](#)



Together, **these five domains** can be the foundation of a transformational framework for **growth**, enabling marketing leaders to achieve the balance required to deliver **immediate results** while planning for **sustained strategic success**.



# TRANSFORMING DILEMMA INTO OPPORTUNITY

**This paper explores the fundamental tension CMOs face between delivering immediate results and building sustainable success. It also examines the operational, economic, strategic, talent, and measurement challenges that compound this dilemma, while identifying how digital transformation creates opportunities to reframe challenges entirely.**

The subsequent chapters of this paper will delve deeper into each element of marketing excellence, providing insights, research and practical guidance for implementation. From optimising marketing operations to embracing emerging technologies, each chapter offers a detailed approach for addressing specific aspects of the growth dilemma.

As a CMO, you stand at a pivotal crossroads within your organisation. You are uniquely positioned to balance operational reality with

strategic vision, translating customer insights into business growth. By embracing the opportunities presented by the growth dilemma, you become more than a functional leader - you become a transformation catalyst for the entire organisation.

The future belongs to those marketing leaders who can master this balance, turning what others see as conflicting imperatives into harmonised drivers of sustainable growth and competitive advantage ■



THE CMO BALANCING ACT



# REWIRING MARKETING



Author

**Jack Williams**

Senior Manager

[jackxwilliams@deloitte.co.uk](mailto:jackxwilliams@deloitte.co.uk)



Author

**Perrine Masset**

Partner

[perrinemasset@deloitte.co.uk](mailto:perrinemasset@deloitte.co.uk)



Contributors

Dina Dong, Emily Aldridge, Georgina O'Sullivan



Marketers can spearhead organisational changes that take whole companies on a journey of transformation.

Marketing has changed more than any other business function in recent years<sup>1</sup>.

The marketing landscape has been profoundly disrupted by technology, with traditional channels like mass media being replaced or supplemented by digital platforms. Social media, smartphone, and other connected devices have revolutionised how marketers engage with their customers, making real-time interactions, personalised experiences and individualised exchanges the status quo that customers expect.

Customer-facing marketing teams have, by necessity, been early adopters who work out the capabilities, limitations and potential of new ideas. For many companies, the marketing function has been a canary in the coalmine, showing other departments the changes they will shortly have to go through too. When we look at the reports analysed by our generative AI tool - **NavigAite™** - many of them reference the significance of the change in the marketing.

Now, the rise of GenAI is already taking marketers to new and exciting places.

In response, the role of the CMO has transformed faster

than any other C-suite position. The CMO's responsibilities have expanded far beyond traditional marketing, to encompass technology, analytics, growth, and measurable impact.

This shift represents a fundamental change in the marketing function's scope and importance within organisations. And whilst the majority of reports we analysed stated how challenging the role of the CMO has become, our experience and data are now showing that CMOs feel good about the transformation their role has been through. They are beginning to reap the rewards of having a more central and important role in the wider business and its growth agenda.

The challenge for CMOs now, is how best to transform and rewire what sits beneath them to deliver value now, and in the future.

"Marketing today is unrecognisable from what it was a decade or two ago. We're expected to be masters of everything – strategy, creativity, data, technology – it's a completely different ball game."

**Marg Jobling, CMO, NatWest**

The changes that CMOs have experienced amount to a structural transformation of the way they work, what they create and how it is used and measured. More quickly than any other business function, marketers have identified barriers to the digital transformation of companies, how to overcome them, and the benefits of doing so.

However, identifying the issue is only the beginning. Marketers are failing to get the most from their technology, are struggling to make full use of the data they are collecting and are operating inefficiently because of legacy workflows. In addition, they are still spending a fortune in unnecessary costs on fat agency rosters. Many large organisations need a significant overhaul of their marketing processes to take advantage of what modern marketing can achieve.

As always, living through a period of intense change presents some distinct opportunities.

Through advances in technology, we now have the potential to deliver more than ever before at a fraction of the speed and cost. Through data we have the ability to understand our customers in more detail than we could possibly need to, and with GenAI we can revolutionise

the way we go about delivering marketing.

This is clearly breathing confidence and excitement into the discipline of marketing. In fact, of the reports we analysed, many talked about a renewed sense of excitement in marketing.

**So, how do we capitalise on that and make the changes that are essential for marketing to keep driving future growth and value for our business? →**



To understand the core issues, we used **AI to scan and analyse over 50 influential marketing reports** from the past two years. This intelligence gathering highlighted consistent themes around the challenges and necessary shifts for modern marketing leaders. Based on this analysis and our own expertise, we've identified the following **five crucial areas for focus**.

### **1. UPSET THE PROCESS OF MARKETING TO UNLOCK THE PASSION**

Marketing has always been about passion – for a brand, a product, or for the act of creativity itself. A sudden influx of technology and data had threatened to dull that passion by overpowering it with process. But changing the processes has now unlocked a new vigour in the sector.

To adopt new technologies, teams often have to learn new skills, adapt to new processes, and add or restructure roles. Before implementing a new tool, you should spend time determining what operating model changes may be required. Organisations and marketers are guilty of bringing in the latest technology to solve an issue without taking a step back first to look at how this technology changes the ways of working and processes around it.

### **2. CLIMB OUT OF THE MARKETING TECHNOLOGY STACK TRAP**

Whether it be a customer data platform, a content management system, or a social media listening tool, MarTech offers significant benefits to businesses to help them communicate in a more relevant way, as well as become more efficient through automation and speed of processing. With GenAI and machine learning, this will accelerate.

But far too many businesses are stuck with underperforming MarTech stacks. Survey data Deloitte published in The Wall Street Journal indicates that the actual impact of MarTech on company performance is **34%** lower than expected, with only **56%** of implementations meeting expectations.<sup>2</sup>

Often, this is because their stacks are new solutions stacked on top of old problems – legacy technology that was never properly implemented or not fit for purpose in the first place.

Now is the time to take stock of what technology you already have. GenAI is creating endless use cases and technology solutions are only going to increase. There has never been a more important time to pause, take stock and create a long-term strategic vision

for your MarTech that aligns to business KPIs.

With nearly all our clients we are now looking at what their composable MarTech architecture looks like, helping them to knit together best-in-class technologies to achieve their individual business needs. This can help drive up productivity and potentially drive down cost. →

“We’re exploring alternative approaches to technology adoption. For example, could we leverage platform-based or licence models to accelerate our modernisation efforts and overcome the current CAPEX limitations?”

**Helen Whetton, Global Brand and Marketing Director, BT**

<sup>2</sup> <https://deloitte.wsj.com/cmo/mind-the-gap-why-martech-implementations-dont-always-meet-expectations-82518a49>



### 3. BECOME THE “GREAT CONNECTORS” OF THE BUSINESS

Marketing is no longer just a support function; it's a strategic growth lever, and CMOs must build the relationships and infrastructure to deploy it effectively.

This requires marketers to move beyond a silo mentality and to embrace a 'Great Connector' approach, not just for themselves, but for their entire team. Encourage your marketers to build bridges with other departments, proactively sharing customer insights and collaborating on initiatives that drive shared value.

Imagine marketing and IT working together to leverage data and technology effectively to personalise customer experiences, optimise campaigns, and unlock new growth opportunities. Picture marketing and product development in sync, ensuring customer needs are at the heart of innovation, leading to products and services that truly resonate with the market. Envision marketing and sales aligned, creating a seamless customer journey from awareness to purchase, maximising conversion rates and customer lifetime value. Think of marketing and finance speaking the same

language, demonstrating the tangible impact of marketing initiatives on business outcomes, securing buy-in for future investments.

Go further and imagine marketing working with human capital to understand how to communicate change effectively to employees, ensuring smooth transitions during periods of transformation. Consider marketing partnering with risk and legal teams to navigate legislative changes, turning potential roadblocks into opportunities for innovation and differentiation.

This cross-functional collaboration isn't just about improving efficiency; it's about unlocking a new level of strategic thinking and innovation. By understanding the challenges and priorities of other departments, marketing can tailor its efforts to support broader business goals. By sharing its unique customer insights, marketing can help shape product development, inform sales strategies, and even influence corporate decision-making.

The future of marketing is not about it staying in its lane; on the contrary, marketers should be encouraged to use the whole road

and to lead other departments in convoy.

The future is about marketing becoming the central hub for growth, innovation, and customer-centricity across the entire business. By fostering a culture of cross-functional collaboration, CMOs can empower their teams to unlock their true potential and drive transformative change throughout the organisation. →

“My focus is not necessarily owning and executing on the entire customer experience, but rather on influencing it through great collaboration with other executives and business functions”

Dan Elton, Former Chief Customer Officer, ASOS



**4. CREATE A CULTURE THAT GETS TEAMS AND INDIVIDUALS COMFORTABLE WITH CHANGE**

A strong internal marketing culture is not a perk, it's a necessity. It fuels creativity, breaks down silos, attracts top talent, and ultimately drives business results by fostering a customer-centric, collaborative, and high-performing team. Investing in culture is investing in marketing success. More important than ever before, is a culture that celebrates change as progress rather than letting it become a source of worry or frustration.

"One of our biggest internal challenges is resistance to change. While our team is capable and delivers results, collaboration is often difficult, and breaking down silos remains a struggle."

**Helen Whetton, Global Brand and Marketing Director, BT**

A lot has changed in marketing and a lot will continue to change. The speed at which our customers move, combined with the technology at our fingertips means marketing departments have to be completely fluid with their role and position in the organisation. Learning new skills and collaborating with new departments are just two examples that will constantly evolve for the marketing team.

Building a culture where it's acceptable not to know everything, or where team members have permission to sometimes fail, is critical. It's also important to build understanding of what value your marketing teams bring to the rest of the business. Instilling this clarity will make collaboration easier to happen.

"Talent is arguably our biggest challenge. We're in the midst of a massive transformation, adopting new tools and approaches at an unprecedented pace. The question is: how do we equip our team to operate effectively in this new reality?"

**Marg Jobling, CMO, NatWest**

**5. TAKE A LONG, HARD LOOK AT YOUR AGENCY SUPPLIERS AND WHICH REALLY ADD VALUE**

When it comes to agency support, you're at a crossroads. The old ways of working, with sprawling agency rosters and hefty fees, are increasingly unsustainable.

This doesn't mean abandoning agencies altogether. Instead, generative AI presents an opportunity to hit 'reset' and rebuild the agency ecosystem for greater efficiency and impact.

Ask yourself: are your agency partnerships structured to leverage this new reality? Are you still outsourcing tasks that could be automated, or worse, paying premium prices for them? The modern marketing function demands a lean, agile approach, where technology and talent work together.

This means identifying the tasks which are ripe for automation, such as translation or content adaptation for new markets. This frees agency partners to focus on higher-value strategic or creative work. It means upskilling your in-house team to harness the power of increasingly intuitive AI tools. And it means prioritising those agency partners which offer true strategic value – those which bring high-level creative

thinking, insightful planning, and specialised expertise that elevates your in-house capabilities.

Of course, this isn't all about bringing everything in-house; it's about maximizing the value of every partnership and resource. By embracing this operational shift, you're not just trimming the fat; you're reshaping your marketing function for the better. You're freeing up resources to focus on what truly moves the needle: big-picture thinking, impactful campaigns, and building a brand experience that resonates in our AI-driven world. The future of marketing is efficient, agile, and conceptually driven.

**The time to rewire your operations is now •**





# TACKLING TECH

Author  
**Colleen Stebbens**  
Senior Manager  
cstebbens@deloitte.co.uk



Author  
**Andy Bourne**  
Partner  
anbourne@deloitte.co.uk



Contributors  
Ben Lancaster-Nogueira, Lily Charlesworth, Harry Touche



Over **14,000** marketing technology (Martech) solutions overload the market today<sup>1</sup>, promising a future of hyper-personalised customer experiences and data-driven marketing decisions.

But the blunt truth is that most companies are extracting poor value for money from their Martech investments. They struggle to make full use of the data they are collecting, battle with legacy systems and workflows, and still spend a fortune paying agencies for tasks that could be automated.

In our recent Deloitte CMO Insights report, we asked 'What are the most pressing issues year-on-year?' The three issues to have grown from 2023 to 2024 were digital transformation, changing customer expectations, and leveraging AI.

This explains a shift in investment focus towards digital transformation, as CMOs seek a competitive edge in a challenging market<sup>2</sup>. Companies typically spend a fifth of their marketing budgets on technology, a figure expected to rise to one third over five years.

Yet, a stark reality offsets this spending spree: marketing's

ability to harness the full power of these tools is lagging behind the abilities of the technology. Recent studies reveal that utilisation of Martech capabilities has dipped to a concerning **33%** (from **42%** the previous year<sup>3</sup>), leaving millions in wasted technology spend on the table.

This imbalance between ambition and actuality presents CMOs with a conundrum: how to weigh prioritising innovation against maximising existing investments, while driving tangible value for the organisation.

To pinpoint the most relevant challenges CMOs are facing today, we used our generative AI capability - **NavigAite™** - to scan and analyse influential marketing reports from the past two years. Combining this initial analysis with our own experience, we've translated these challenges into significant opportunities to address the growth dilemma by not only keeping up with the pace of change but also unlocking the true value of Martech investments.

# MASTERING MARTECH: KEY CHALLENGES FOR TODAY'S CMO

**Success in any industry requires a balance between maintaining steady performance and being adaptable to change and focusing on long-term evolution. In the fast-paced world of marketing technology, much as in the classic 'long vs short' argument, CMOs must perform a balancing act.**

**We have identified five key challenges CMOs need to address to effectively balance short-term pressures and guide their businesses through transformative change, and five solutions that will help facilitate their efforts. →**

<sup>1</sup> Statista, May 2024. <https://www.statista.com/statistics/1131436/number-martech-solutions/>

<sup>2</sup> 2023, Deloitte. Global Marketing Trends 2023. <https://www2.deloitte.com/us/en/insights/topics/marketing-and-sales-operations/global-marketing-trends.html#read-the-trend1>

<sup>3</sup> 2023, Gartner, Inc. '4 Actions to Improve Martech ROI.'



## 1. WHO'S STEERING THE TECH SHIP

Most organisations struggle, in some form or another, with silos. This is especially true when it comes to Martech buying decisions. Often, it's primarily the tech team that makes these investment decisions, leaving marketers out of the loop on important conversations.

**Marg Jobling, CMO of NatWest**, notes that, "Our biggest challenge is how Martech was procured and used – it was done without marketing's involvement."

Conversely, we also see this scenario happen in reverse. For example, a marketing team growing quickly might impulsively pick up a new tool to solve a specialised problem for a specific channel, without involving tech to see if it aligns with their wider architecture and strategy.

There are business risks associated with these misaligned tech decisions, including wasted budget, disjointed customer data, and hindered campaign effectiveness. Clearly, marketers need a seat at the table, not just as stakeholders, but as key partners to help shape tech strategy, and optimise value, from the start.

To address this, removing silos, and encouraging cross-functional collaboration, must start from the top.

CMOs should partner with their CTO/CIO and CDO counterparts to align the company's tech architecture to the overall marketing strategy. Meanwhile the marketing team should be brought into key procurement decision-making, to ensure tech is fit-for-purpose.

Equally, tech and data teams should involve marketers to validate how tools will be used to deliver the value of their investments, contributing to mutual success across all teams. This should include establishing clear ownership, defining roles, and setting shared and measurable objectives before contracts are signed.

Crucially, this should be underpinned by clear communication between teams, putting processes in place to achieve symmetry and make the most of all that shiny new tech.

## 2. THE QUEST FOR MEANINGFUL MARKETING ROI

Perhaps the most prevalent challenge for today's CMO is proving that marketing is a strategic, value-driving function rather than simply an expense. This struggle is highlighted by a recent survey revealing that only **52%** of senior marketing leaders can effectively demonstrate marketing's contribution to business outcomes, with the rest reporting that marketing is viewed as an expense rather than a strategic investment<sup>4</sup>. While the adage "half the money I spend on advertising is wasted; the trouble is, I don't know which half" may have held true in the past, today's data-driven environment demands greater accountability.

Modern marketers are expected to juggle multiple roles, simultaneously performing duties across strategy, brand, omnichannel delivery, and measurement. This multifaceted role is further amplified by Martech, with added pressure to be tech experts and data analysts, and to report on quarterly results on top of proving long-term value.

However, despite advances in attribution, Media Mix Modelling (MMM), and AI-powered analytics, achieving a comprehensive

measurement approach remains a significant hurdle. CMOs must walk a tightrope between demonstrating the impact of traditional marketing KPIs (e.g., engagement, sentiment) and connecting those metrics to tangible commercial outcomes that resonate with the C-suite.

Beyond delivering ROI for the marketing function, marketing can also deliver value for other parts of the organisation.

Now more than ever, we see the need for marketing to play a role in estimating, activating, and measuring the value of various data and tech investments.

For example, an organisation investing in a customer data platform (CDP) will need to make a business case, often a tech or data-led decision. Typically, the business might not realise a benefit from this type of transformation programme until 12+ months post-implementation. However, by identifying and leveraging activation use cases - such as how to grow customer value by integrating a Customer

Lifetime Value (CLTV) model - marketing can help illustrate a potential ROI much sooner.

To do this successfully, it's critical to define what value means to the organisation, and what role marketing can play in achieving that. Whether it's driving incremental revenue growth, improving customer experience, building brand loyalty, or optimising profitability, CMOs need to be laser-focused on what type of value is most important to the business, and organise their objectives, team, processes and measurement around this. →



### 3. BRIDGING THE SKILLS GAP

With a dizzying array of new technology such as generative AI now available, CMOs face another challenge. Finding talented people with the right skillsets and building robust teams is an unavoidable and sometimes overwhelming task.

LinkedIn data suggests that by 2025, key missing skills will centre around data and analytics strategy, SEO, content marketing, and paid media expertise. Economic pressures to recruit adaptable marketers with broad skill sets may be contributing to a lack of in-depth expertise in specialist disciplines.<sup>5</sup>

Underdeveloped skills in these areas can hinder progress and reduce business impact. For example, the inability to leverage data to achieve personalisation, or ineffective SEO, leading to poor organic reach.

This challenge is further compounded by a lack of capacity or understanding within organisations about how to best use the wide variety of available technology to its full potential.

The result is a complex dilemma: invest the time and money to build necessary skills and get existing talent up to speed or outsource to specialised agencies and risk over-reliance.

When it comes to developing new skills and capabilities CMOs, like other C-suite members, need to weigh the “build vs. buy” decision, balancing short-term needs against long-term goals.

For example, it might be critical to hire or source external talent to help you adopt and implement a specific piece of tech where those skills don't yet exist in-house.

On the flip side, it might be more valuable in the long-term to invest in your current team's development and build from the ground up.

CMOs should tip the scale towards investment when they think they will need a base level competency moving forward (e.g. personalisation, data-driven marketing, GenAI), and stabilise that by fostering a culture of continuous learning, to be well-prepared for changing market demands. →

“Our tech stack challenge is ‘development velocity’; the tech team’s capacity limits our operational agility in evolving the customer experience.”

Dan Elton, Former Chief Customer Officer, ASOS

<sup>5</sup> <https://www.linkedin.com/pulse/marketing-skill-shortages-address-2025-how-find-you-dee-anne-q9nme>



#### 4. THE TIME LAG FROM IMPLEMENTATION TO OPTIMISATION

Accelerated Martech evolution promises endless advantages but also demands a relentless pace of adaptation, presenting a two-pronged challenge:

Integrating new tools into already-complex systems is only half the battle. Ensuring teams are equipped to effectively use these technologies and capitalise on their benefits is where many organisations stumble.

As one CMO noted, even after implementing a powerful platform like Salesforce, the question becomes: “Do the people know how to continue to make the most of the platform and understand all its possibilities? Are they using it to its fullest potential?” The lack of proper change management can render even the most customer-centric platforms ineffective in driving meaningful improvements.

Optimisation must be achieved before obsolescence. Generative AI, the latest buzzword on everyone’s mind, exemplifies the challenge of keeping pace with emerging technologies.

While its potential is undeniable, practical and effective implementation remains elusive for many.

Even established technologies such as marketing automation remain significantly underutilised, leaving marketers grappling with manual personalisation in an age of heightened customer expectations. Diagnosing and overcoming these adoption hurdles quickly is imperative to unlocking value, before momentum shifts and it’s already time for the next new thing.

A two-pronged challenge necessitates a two-pronged response: optimise what you have today while planning for what you will need tomorrow. It can be easy to get caught up in the hype around things like GenAI and worried about being left behind, but teams should master walking before learning to run.

For CMOs, this means diagnosing why you struggle to maximise use of your existing technology: is it the tech itself or integration of various systems? Is it a lack of access to quality data or are the people and processes ill-equipped to leverage it?

By solving for these problems now, when it comes time to invest in your next piece of marketing tech you will be better prepared to support its adoption.

Also, where possible, be sure to pilot new technologies and measure their impact before committing to a full-scale adoption to help test the potential impact that can be realised. →

“Workflow management is a major challenge. We’re an £8 billion organisation with over 1 million customers, so managing our marketing deliverables and budgets across so many areas can lead to logistical issues around version control and wasted time.”

Helen Whetton, Global Brand and Marketing Director, BT



## 5. ADDRESSING CULTURAL OPPOSITION

CMOs must foster a culture that readily adapts and embraces the changes that come with new technology. Resistance, which often stems from fear or a lack of understanding, can hinder even the most well-intentioned implementations.

For example, if teams don't receive adequate training and support they may underestimate the capabilities of a technology, or remain unaware of its benefits and applications to their jobs. In this case, a new tool is likely to be met with reluctance and underutilisation.

Additionally, unclear ownership and governance structures will lead to confusion and a lack of accountability when managing and optimising new investments. Many CMOs must also exercise responsibilities surrounding data privacy and ethical data usage, ensuring alignment with industry regulations.

Rather than shying away from cultural barriers, savvy CMOs can turn resistance to Martech into an opportunity for positive change, by prioritising a people-centric approach.

Instead of leading with technology, they must champion transparency, clearly communicating the "why" behind new tools and showcasing their benefits for both individuals and the organisation.

Training programmes that not only impart technical skills, but also cultivate understanding and enthusiasm, will further empower teams to embrace change. Equally important is establishing clear ownership and governance frameworks for Martech investments, defining roles, responsibilities, and processes to ensure accountability and minimise confusion.

Regarding data privacy concerns, CMOs should work with the wider organisation to implement robust governance policies, ensuring compliance, and forging a culture of responsible data stewardship. By embracing these actions, CMOs can transform potential resistance into a groundswell of support, positioning technological change as a catalyst for growth and innovation.

# FACING THE FUTURE OF MARTECH

**The path to unlocking the full potential of Martech is not without obstacles. But, by viewing these challenges as opportunities for growth and innovation, CMOs can position themselves as pivotal drivers of change within their organisations.**

**This requires a shift, from simply acquiring technology to strategically aligning it with business goals, fostering collaboration across departments, and equipping teams with the skills to thrive in a data-driven landscape.**

**Whilst the rapid pace of technological advancement may feel daunting, CMOs who embrace a culture of continuous learning, data-driven decision-making, and agile adaptation will be best positioned to navigate the evolving Martech landscape and deliver meaningful value for their businesses.**



# FLIPPING LOYALTY

Author

**Rupert Faircliff**

Senior Manager

[rupertfaircliff@deloitte.co.uk](mailto:rupertfaircliff@deloitte.co.uk)



Author

**Katie Farrell**

Director

[kffarrell@deloitte.co.uk](mailto:kffarrell@deloitte.co.uk)



Contributors

Sophie Pullum, Rebecca Sinclair



The term **‘brand loyalty’** conjures up a range of images, from a coffee shop stamp card (‘tenth one is on us!’) to the extreme fandom of those camping out overnight to buy tickets to a Beyonce concert.

CMOs **recognise** that a strong brand is more than a logo or a tagline; it’s the sum of every interaction a customer has with a company. The marketing challenge lies in translating core brand values into tangible, **loyalty-driving experiences across every touchpoint.**

While digital channels offer powerful tools for personalisation and engagement, CMOs are wary of letting them crowd out essential human interaction, itself a driver of loyalty.

And there remains a constant struggle by CMOs to communicate the value their efforts to drive loyalty have on company growth. Quantifying and communicating the value of brand loyalty to stakeholders can feel like a Sisyphean task, the act of forever pushing a rock uphill.

Yet the long-held maxim that brands should cultivate brand or customer loyalty –

what Investopedia defines as ‘a consumer’s commitment to repeat purchases of a particular brand regardless of price’ – is increasingly being called into question.

Despite a wealth of market literature on loyalty, marketing scientists Romanik and Sharp of The Ehrenberg-Bass Institute argue that traditional notions of loyalty are often overstated.

They posit that buying behaviour is largely habitual rather than driven by deep emotional connections. Furthermore, in marketplaces often concerned with customer

loyalty programmes – such as supermarket retail - they suggest these programmes mainly reward existing customers without significantly attracting new ones. Meanwhile, they argue, recruiting new customers is essential to growth, and loyalty has little impact on that.

At Deloitte, our work with leading global brands reveals a powerful truth: the most successful businesses prioritise *their* loyalty to customers, not the other way around.

**So, customers shouldn’t be loyal to brands; brands should be loyal to customers. →**





# REDEFINING LOYALTY IN A MODERN CONTEXT

To pinpoint the most relevant loyalty challenges facing CMOs today, we used our generative AI capability - NavigAite™ - to scan and analyse influential marketing reports from the last two years. Combining this analysis with our own experience, we’ve highlighted three key loyalty themes to help CMOs build brands now and in the future.

To understand how brands can be loyal to their customers, we need to re-examine the meaning of loyalty itself.

Dictionaries define loyalty as ‘a strong feeling of support or allegiance,’ ‘devotion to a country, philosophy, group, or person,’ and ‘faithfulness to commitments or obligations.’

While these definitions feel somewhat traditional, the language even old-fashioned, they highlight three core themes highly relevant to building loyalty today and in the future.

## 1. CUSTOMER OBSESSION: THE ENGINE OF BRAND LOYALTY

This stems from the idea of devotion. Loyalty to customers means putting them and their needs at the heart of how you organise your business. A culture of healthy customer obsession means the customer is prioritised across the business, from innovation to CX, operations to marketing.

Active listening is required to understand their true needs, which may differ from their stated desires. This is where traditional, transaction-focused loyalty programmes often fail. By focusing solely on purchases, they miss the underlying needs driving customer behaviour and fail to cultivate lasting relationships. They cannot measure what didn’t happen or learn why.

Truly loyal businesses gather and act on real customer insights. And while typically the most robust approach to data collection and insight gathering may be a long-term investment, it doesn’t have to be. For instance, the simple act of senior management taking themselves out of the office and on to the front line with customers can yield revelatory insight that can be acted on immediately.

Analysing customer feedback and behavioural data allows brands to:

**Personalise Experiences:** Understanding individual preferences enables brands to tailor offers and communications. Starbucks, for example, leverages its app to deliver personalised rewards, such as free drinks on customers’ birthdays.

**Continuously Improve:** Actively seeking and analysing customer feedback allows brands to refine their offerings and enhance the overall customer experience. McDonald’s introduction of the all-day breakfast menu, driven by insights gleaned from social listening, exemplifies this approach.

To succeed in making customers feel an organisation’s loyalty, employees too must feel it. Indeed, our wider research

“Brand is everything. I truly believe that. In our company, every single employee is a brand ambassador. It’s reflected in every letter we send, every phone call we make. When you’ve built a strong brand, it permeates the entire organisation.”

Marg Jobling, CMO, NatWest

demonstrates that engaged employees are **43%** more likely to recommend their organisation as a place to work and are **37%** more productive<sup>1</sup>.

So how to do this? Our experience shows that brand is the connecting tissue that can join the dots between business strategy, business model, and culture.

Externally a strong brand promise differentiates you in the market. It fosters long-term demand, drives top-line growth and enables premium pricing. But internally, brand provides clarity and a sense of belonging. It streamlines operations in the here and now through a clear framework for decision-making, boosting efficiency and productivity. In short, brand is a multiplier for both short- and long-term performance.

This internal loyalty translates into market outperformance. ‘Consider The LEGO Group, a company with a powerful brand idea – ‘Play Well’ – at their core. This clear sense of identity, purpose, and customer focus provides guiding principles for every employee’s decision-making. The LEGO Group shows devotion and loyalty to its brand, to its people, and to its customers. →

<sup>1</sup> <https://www.deloitte.co.uk/mediatelecomsbeyond/assets/pdf/deloitte-uk-trust-in-telco.pdf>



**2. EXECUTIONAL EXCELLENCE: DELIVERING ON THE BRAND PROMISE**

Defining a compelling brand promise is only the first step. To demonstrate true loyalty, brands must deliver on that promise across every customer touchpoint. Technology can help, but businesses are seeking to balance technical solutions with human connections.

This means equipping employees not just with the right tech, but also with the right training and actionable data.

Our analysis shows that businesses can increase customer acquisition by up to **200%** by aligning values, messages, processes and behaviours through experience. This sees brands deliver immediate customer satisfaction whilst building long-term advocacy.

The improvement extends through to retention, with **88%** of customers more likely to buy again<sup>2</sup>.

Again, it's the brand that can join the dots. Indeed, NatWest views customer experience through the lens of brand experience:

“While businesses tend to respond better to the term ‘customer experience,’ I believe ‘brand experience’ is the true driver. Brand trust and differentiation directly correlate to growth. It’s crucial to communicate this message to the highest levels of the organisation.”

**Marg Jobling, CMO, NatWest**

This strategy requires embedding the brand into the very fabric of the customer proposition, collaborating with functional and operational teams to design and deliver a cohesive brand-led experience across all products and services.

BT, for instance, bases its customer experience development around its core brand ambition of trust. →

“Our ambition is to be the most trusted brand in the market. We understand that when trust is broken, customer satisfaction plummets. That’s why we place such a high value on reliability and security.”

Helen Whetton, Global Brand and Marketing Director, BT



### 3. CONSISTENCY: SHOWING UP AND PROVIDING VALUE RELIABLY OVER TIME

Building brand equity and trust in the mind of the customer requires consistent presence and reliability. In other words, a brand shows loyalty to itself and its customers by being consistent, and that engenders loyalty from customers.

From a communications perspective, the latest research from System1 and the IPA<sup>3</sup> finds that brands which score in the top **20%** for creative consistency are more likely to generate awareness, achieve differentiation, and drive attitude change.

Of course, all brands must evolve to remain relevant. But the strongest brands do this while remaining true to their core values and strategic positioning, even when faced with market fluctuations or new trends. The fundamentals remain constant, reflecting that loyalty to both their customers and themselves. Think of Apple – a beacon for customer-centric innovation, but loyal to its core brand positioning of humanity, creativity and simplicity.

There is a cumulative effect to showing up consistently over long periods of time. BT's unwavering focus on trust, both internally and externally, has fostered long-term customer relationships:

“It’s incredibly rewarding to see previous customers return because they value our trustworthiness. In today’s world, where customers are bombarded with choices, those core values are essential differentiators. Consider the damage caused by unreliable services – fraud, security breaches, and poor service all erode trust.”

**Helen Whetton, Global Brand and Marketing Director, BT**

Consistent presence also entails meeting customers wherever they are, showing up for them when they need you.

Brands that strike the right balance with the level of presence in their customers’ lives, ensuring it feels intuitive and additive rather than jarring and intrusive, are demonstrating loyalty in a tangible sense.

Through their ecosystem of app, Alexa smart speakers, subscriptions, and – for a period – Dash buttons, Amazon has walked this line. Ultimately the result today, delivered through the compelling value proposition of Prime, is that consumers know they can rely on Amazon to make purchases an instant and friction-free experience. And so customers buy from Amazon, repeatedly.

So, whether it’s WhatsApp, email, SMS, phone call, in-store interactions, or any other touchpoint, loyal brands make their experience accessible through the channels their customers prefer. BT exemplifies this omnichannel approach:

“Digital channels are key, with **90%** of our customers engaging with us through our app. We’re focused on making it the primary touchpoint for a seamless, engaging experience... However, digital is not enough. We need to connect it across all channels, including in-store and in-branch interactions.”

**Marg Jobling, CMO, NatWest**



# BRAND LOYALTY: A TWO-WAY STREET

**In conclusion, true brand loyalty is not about expecting customers to be inherently loyal.**

**Instead, it’s about brands demonstrating their own loyalty to customers through obsessive understanding and service, executional excellence, and consistent, value-enhancing presence.**

**By embracing these principles, businesses can realise short-term value whilst cultivating strong, lasting relationships with their customers, driving sustainable growth and solidifying their position in the market.**



# WINNING CONTENT

Author  
**Matt Clark**  
Director  
[mjclark@deloitte.co.uk](mailto:mjclark@deloitte.co.uk)



Author  
**Olivier Binse**  
Partner  
[obinse@deloitte.co.uk](mailto:obinse@deloitte.co.uk)





Is your content winning or just making noise? Brands are creating more content, more quickly, than ever before. But this content is not necessarily any better at engaging customers or hitting performance goals than the smaller volume of content that they used to create.

**To quantify the challenges and identify solutions, we used our generative AI capability - NavigAite™ - to scan and analyse the most respected and influential marketing reports of the last two years. We combined the results with our own experience and that of a panel of CMOs to dig deep into the content conundrum.**

**The way we make and manage content is changing as quickly as every other part of marketing. In our meta-analysis of recent marketing reports, two trends stand out:**

An overall growth in the capacity to produce content, and

Flatlining confidence in the ability of marketing teams to handle the operational challenges this creates.

The chances are you're better at making content than you used to be. Equally, you may not be any better at making content that achieves its engagement and performance goals.

"The challenge of scaling personalised content is clear: when you have 500+ variants, how do you effectively measure performance and optimise delivery?"

**Dan Elton, Former Chief Customer Officer, ASOS**

It is increasingly apparent that companies are not balancing the relentless quest for more speed and technical potency – typified by the sense of urgency we all feel to master the new world of automation and AI – with the need to maintain operational coherence, content quality and, ultimately, impact and value.

### **1. CAUGHT IN THE EFFICIENCY TRAP**

If your employer is anything like the organisations that contributed to the reports we analysed, you are under intense pressure to do more with less.

Our AI analysis highlighted that on average, marketing budgets are down by **15%** and the remaining money has been turned sharply into activities that promise immediate results. Noisy, relentless, top of funnel stuff – fighting for attention, driving leads.

Meanwhile brand building, customer loyalty and advocacy must be deprioritised as you strive to deliver the greater efficiency demanded by your finance team.

But consider this: paid media spend is back up to 2018 levels. More content, lower organic cut-through? That seems likely. Marketing teams are stretching to hit productivity goals while struggling to maintain quality and impact as a consequence. →



## 2. THE CONTENT CONTROL CONUNDRUM

Then ask this: Have you truly taken ownership of your content?

From strategy to production, you're likely still beholden to agencies for much of your output. And you are probably not as good as you think you are at holding them to account for their performance. This explains why more and more businesses report being part of a noticeable trend towards in-house content creation.

Which, in turn, suggests a growing awareness of, and dissatisfaction with, the existing dynamic. It indicates a desire to take control of content strategy and to reclaim overall direction and ownership, from concept to execution.

It is also worth noting that, in this context, marketing teams are increasingly central to the growing scrutiny exerted on various compliance regimes. Companies are obliged to meet obligations that are regulatory or legal (e.g. Consumer Duty in Financial Services), product regulations (in e.g. Pharma), new Accessibility frameworks such as the EAA, as well as in-house rules about brand and tone consistency. Taking greater operational control reduces the number of moving parts involved in these tasks.

## 3. NEW AUDIENCE IMPERATIVES

Global spending power is shifting. While Boomers still outspend relative to their share of the global population, Gen Z is set to be the largest, wealthiest and highest-spending generation in history, adding **\$12tn** to global spending by **2030**.<sup>1</sup>

The shift of focus to younger consumers is already driving substantial new content paradigms. Brands are embracing new formats, experimenting with different tonality and values, and navigating the ever-evolving landscape of the creator economy.

This younger, emerging, consumer generation, with its enthusiasm for authenticity, local relevance, and constant novelty, is forcing brands to rethink the 'why?' and the 'what?' of their creative approach. At precisely the time, many of them are already suffering existential crises about the 'how?' and the 'where?'

## 4. PERSONALISATION – NO, REALLY THIS TIME

Creating truly personalised content remains the biggest unfulfilled potential upside for marketers. After decades of promise, the shift in speed and power heralded by AI, has brought the possibility of true personalisation into sharp relief.

Effective personalisation capability allows organisations to accelerate the pace and scale at which their content can connect to audience interests, cultural moods and media trends, significantly enhancing relevance and reach.

More targeted content can also help businesses market the long tail of their products and services, more reliably connecting user demand with their offering over a sustained period.

Happily, customers are ready for this. Expectations regarding effectively personalised digital journeys are well established, with one key proviso: it's about tangible, usable personalisation. Product recommendations, for example, or a thoughtfully presented content curation.

The evidence that customers even notice – let alone expect – personalisation in the upstream, brand and awareness-focused parts of their journey is limited.

Our AI-analysis reveals a big gap between organisations which say they understand and practice personalisation well (typically **80-85%**) and the percentage of consumers who agree that effective personalisation is a substantial and regular part of their experience (**61%**).

Nevertheless, the opportunity is there. Spend on capability and tech is up between **8%** and **12%**<sup>2</sup>, bucking overall trends. Organisations that lay claim to successful personalisation initiatives report an increase in key metrics like conversion, order value, and customer satisfaction.

## 5. GET SMARTER, ONE AND ALL

On top of everything, you're probably battling to realise actual gains from all the Martech investment your business has made, as it diverts your team's attention from the creative side of customer engagement.

This highlights another discernible strand in our analysis of reporting: the importance of data-driven decision-making.

We all understand that this matters - but most organisations report that the skills and capabilities to truly make that stick are lagging. Spend on relevant tech and process is up somewhere between **15%** and **25%** but spending on people and skills is falling.<sup>3</sup>

Fully **60%** of marketers say they have found it necessary to reshape their content teams in the past 18 months, often more than once, because they are struggling to adapt to the pace and scale of change. →

"We've streamlined our agency ecosystem, moving away from traditional creative pitches to focus on finding partners with the right chemistry. We now have a collaborative 'Onederland' setup, with clear roles and responsibilities."

**Helen Whetton, Global Brand and Marketing Director, BT**

<sup>1</sup> <https://nielseniq.com/global/en/landing-page/spend-z/#:-:text=Meet%20Gen%20Z,largely%20untapped%20lever%20of%20growth>  
<sup>2</sup> Gartner  
<sup>3</sup> <https://www.mckinsey.com/capabilities/mckinsey-digital/our-insights/the-top-trends-in-tech>



6. ALONG CAME AI

Looming over all of this is the runaway steamroller of AI.

In fact, only a small proportion of businesses report having truly embraced its potential, but AI dominates conversations about the future of marketing.

The role of generative capabilities, in everything from ideation through to optimisation, is recognised<sup>4</sup>. Nearly one in three marketers are already using GenAI in their marketing content supply chains; the number using GenAI to brainstorm ideas has almost doubled in a year; content marketing teams with high automation capabilities are reporting a higher revenue impact from their content.

But across industry, AI is not fully understood. Indeed, AI feels a bit like a symbolic presence in organisational thinking, where it is used to represent speed and scale of change more broadly, and to reflect the uncertainty and fall in confidence this causes in marketing functions.

However, the potential benefits of AI could be far more

substantial than many companies realise. Unsurprisingly, smaller organisations are outperforming larger ones in adoption and experimentation, reflecting stereotypical differences in the ability of larger organisations to respond with agility to substantial market shifts.

**There is an interesting triangle of tensions at play:**

One, a widely acknowledged inhibitor amongst marketers is a lack of trust that AI will faithfully represent marketing and communications imperatives across brand, product and service, with due regard for ethics generally, and the handling of data and data privacy specifically.

Two, a majority of marketers don't believe their marketing ecosystems are equipped to deal with the scale and pace of change that AI could bring. Only four in ten marketing organisations have made effective investments in durable automation capabilities, for example.

Three, consumers are ready for AI – but in mainly functional terms. They can see the value in tangible use cases like shopping assistance or customer service

interactions. But they have no strong points of view on GenAI content and experiential uses of AI, mainly because its footprint in their everyday experience remains very low.

7. MANAGING THE NARRATIVE

As ever, there will be mixed signals about how well this is going, depending on who you are listening to. The C-Suite by nature tends to be enthusiastic about how spend on big marketing tech and operations initiatives will show tangible results.

Among practitioner-level colleagues, sentiment is more divided. Feedback commonly shows that such initiatives are at best partially successful.

In much the same way that many tech transformation initiatives don't have a distinct customer-centred approach at their core, so many such

programmes don't necessarily address the needs of operational users either. This has a substantial impact on performance: many organisations have invested in sophisticated CMS and CDP platforms, but struggle to design and implement a coherent conceptual thread across segmentation, taxonomy, metadata, and performance analytics.

As the significance and impact of new technology bites, the cross-industry lag in skills and abilities denies organisations the opportunity to truly capitalise on the tech and process investment they have made.

8. LAUNCH 'OPERATION CHANGE'

Operational design, operational control, staffing, talent management, skills development, tech and data management, effective strategy and stakeholder management. It's quite the list.

The common denominator? These are all disciplines in which you will be challenged by the way you currently operate, and by the transformation required to maximise your operational capabilities.

A conversation that starts with the content you make soon becomes a conversation about the extent to which you have the people, processes, governance and reporting capabilities to future-proof your plans for content.

**So how does a CMO set the pace? →**



**9. THE PATH FORWARD:  
FASTER AND SMARTER;  
TECH AND HUMAN**

**Yes, you need to go faster. But not for the sake of it, or at a cost to other factors.**

No matter how much faster you try to go with new tech, you'll never pick up enough speed to stay permanently ahead of the pack. To gain confidence that you're winning with content, rather than just making more noise, take a breath. Figure out, first and foremost, how you can be smarter, not faster.

**Take ownership:** reclaim control of your content, with careful choices about where you place trust and build capabilities – whether in-house, or through forging stronger, more collaborative partnerships externally. Ensure everyone is aligned with your content vision and overall business goals, and match the wider market's shift toward building measurement and optimisation expertise.

**Experiment with and for your audience:** the content landscape is in perpetual motion. As we embrace new technologies, so we must experiment with emerging formats, new consumption trends and new audience appetites. The pace of change is nowhere more noticeable and demanding than in the ceaseless battle for the attention of the next generation of consumers.

**Don't forget the 'people' bit:** for the best part of a quarter of a century, enterprise content management, in all its forms, has seen vast investment, across generations of platforms and capabilities. Many a CTO or CMO career has been made on the back of successful installation of a new CMS, or an eye-catching CRM programme. But the impact and capabilities of the people using those platforms – and the content they make and manage – has

been harder to demonstrate.

Many of the challenges we routinely see content professionals struggle with are in the foundations of content marketing: knowing what you've got, what it's for, where it is, who's using it and what impact it's having. More investment does not necessarily solve those issues.

**Data is hard – embrace it:** this is a key battleground in the 'faster and smarter' domain. Genuine competitive advantage is the prize for marketers that successfully launch and make good use of top tier data capabilities. It is critical to match investment in technology with skills development: upskill your teams, hire strategically, and cultivate a culture of experimentation and continuous learning.

**Keep at it with AI, strategically:** identify specific use cases where AI can bring demonstrable value, to show that automation can enrich team capabilities without endangering their organisational, regulatory and ethical commitments. Build trust gradually. Don't pursue AI initiatives simply because they promise speed, or scale, or reduced headcount.

**10. PRIORITISE ENDURING  
OPERATIONAL EXCELLENCE**

All these dynamics can have profound operational implications: many marketing functions have lost the muscle memory for this type of organisational performance after years of outsourcing the capability.

It can require substantial investment in internal operations, talent acquisition, and the development of robust data analytics capabilities specifically tailored to content performance, plus the governance wrapped around all that, to make it work.

**The future of content belongs to those who can strike a critical balance: moving swiftly without sacrificing quality, making technology matter without losing the human touch, and ultimately, creating winning content that is more than just noise.**



# BECOMING FUTURE-FIT



Author  
**Laura Grayling**  
Senior Manager  
[lgrayling@deloitte.co.uk](mailto:lgrayling@deloitte.co.uk)



Author  
**Alex Curry**  
Partner  
[alcurry@deloitte.co.uk](mailto:alcurry@deloitte.co.uk)





Looking to the future, it's clear that the balancing act CMOs face will only get more complex.

Marketing is becoming ever more socially-led, rooted in creating cultural moments as well as using technology in surgical fashion to target micro communities of consumers. What skills must future-facing leaders develop to thrive?

**To answer this question, we used technology to our advantage through our generative AI capability - NavigAite™. This scanned some of the most influential recent marketing reports across the industry to understand where consensus lies today. We also spoke with leading CMOs across the industry to gain their perspective. So, what did we find?**

Our view is that CMOs must become the ultimate polymaths – able to balance tech, data-driven expertise, and consumer insight with strong creative firepower.

What also struck us is that despite the sweeping changes anticipated in marketing, the discussion around CMO skills is limited. Too much discussion is focused on the short-term tension at the heart of marketing, instead of the need for CMOs to be catalysts for changes needed tomorrow.

Our research identified a number of top skills that CMOs must possess to get this balance right. →



**1. NAVIGATING CROSS-FUNCTIONAL COMPLEXITY**

There is strong consensus that CMOs need to become master integrators. Businesses need to be ever more consumer and customer centric as barriers to entry are lowered by technology, and as competitive pressure intensifies.

Responding to this requires an ability to assemble high-performing cross-functional teams to break down silos and inspire action – not just within marketing, but across entire organisations. The modern CMO must be a T-shaped leader: a specialist in their field, but also a generalist, able to collaborate, influence and drive growth as a trusted adviser to the business.

“For me, marketing is becoming increasingly intertwined with leadership, management, and commercial strategy. It’s no longer a siloed function; it’s integrated with sales, product development, and every customer-facing aspect of the business.”

Helen Whetton, Global Brand and Marketing Director, BT

**2. EMBRACING ADAPTABILITY**

Agility and adaptability aren’t just desirable traits for the modern CMO; they’re an absolute necessity.

This translates to the role requiring a unique blend of ‘hard’ and ‘soft’ skills. CMOs need to have the resilience, problem-solving ability and creative thinking to respond fast to fluid market dynamics. On the flip side, they need to be able to understand, analyse and apply data effectively, driving faster decision making as a result. They need to be skilled scenario planners, using the latest tech to simulate the impact of their decisions in a way that is far more real-time and reactive. →

“Data agility is crucial. We need to be able to access and analyse data quickly to make informed decisions in real-time. However, we also need to balance this agility with strategic consistency. While data can inform our tactics, it shouldn’t dictate our overall direction.”

Marg Jobling, CMO, NatWest



**3. BUILDING TECHNOLOGY FLUENCY – ESPECIALLY IN AI**

CMOs don't need to be deep technologists, but they do need to be comfortable with the MarTech stack and be willing to experiment.

They need to know how to qualify tech opportunities and pull reality apart from hype. This is especially true in AI – whether using GenAI to power the content engine or agentic AI and automation to streamline marketing processes. It's about making bold, calculated bets on emerging technologies and possessing the flexibility to pivot when the evidence dictates a new direction.

“CMOs are well-placed to lead Gen AI adoption, given marketing's position at the forefront of its application in comms and content.”

Dan Elton, Former Chief Customer Officer, ASOS

**4. CHAMPIONING A CREATIVE RENAISSANCE**

With the technification of marketing, many CMOs have lost sight of their core role as custodians of creativity.

They must lead from the front in evolving core marketing skills such as storytelling, insight development, customer journey mapping and brand building. CMOs must inspire their teams to participate in markets, cultures and communities to sense trends and bring creative, human judgement into a tech and AI-automated world.

This needs to be seen in how they collaborate with other functions too, when solving business problems, or injecting creativity in contributions to NPD or broader growth opportunities. →

“This is a unique intersection. The CMO must be deeply knowledgeable about customer segmentation and brand strategy while also being comfortable navigating technical solutions and data-driven decision-making.”

Marg Jobling, CMO, NatWest



## 5. EXPLORING PURPOSE-DRIVEN MARKETING

An often-cited skill picked up in our AI research is the ability for CMOs to infuse purpose into marketing practice.

Many feel it is important to inject an element of purpose – often around issues of sustainability or social responsibility, or possibly around a single specific issue that matters to company founders - into how they develop marketing strategies. CMOs we have spoken to highlight the personal importance of this as a driver.

However, our belief is that the concept of ‘purpose’ risks being over-used and diluted. A valuable CMO skill lies in the having an innate ability to understand the values and passions of their audience, and to translate that into marketing interventions that resonate authentically. CMOs must help their teams to embed themselves into the communities their brands serve.

This is a key element to how CMOs build brands that transcend transactional relationships and build genuine, lasting connections.

“The most inspiring marketing I see today comes from purpose-driven B Corps. Their commitment to social and environmental responsibility permeates everything they do, including their marketing. That’s the kind of authenticity and impact I aspire to.”

Helen Whetton, Global Brand and Marketing Director, BT

## OUR PROSPECTIVE FUTURE CMO ARCHETYPES

Based on our AI findings and insights from the CMOs we engage with, it is clear that CMOs will need to be multi-faceted leaders, balancing the heart and the head of marketing.

They must be fluent in the languages of both logic and emotion. But, just like individuals, there is no single model for how to manage this tension in a positive way. Instead, we see different winning ‘archetypes’ for future CMOs.

First up are CMOs who are catalysts for change. They must be motivators, cultivating a relentless growth mindset that thrives on pushing boundaries.

“The world is changing at an unprecedented rate. As leaders, we need to find ways to motivate our teams amidst constant change and uncertainty.”

**Helen Whetton, Global Brand and Marketing Director, BT**

These catalysts will be able to paint a clear vision to inspire their teams and collaborators, bridging the space between now and later. They must have the human intuition to recognise sources of hesitancy and challenge them head on. This must be paired this with a relentless drive to build, and embed the new marketing capabilities needed to get there. →



'The blurring lines between commerce and marketing present a fundamental shift; I anticipate and observe these functions increasingly merging, reshaping the CMO's remit.'

**Dan Elton, Former Chief Customer Officer, ASOS**

Second, we have your ruthless executional operators. These CMOs have the rigour and focus to put in place complex long-term transformation plans and track them step-by-step to completion. These CMOs shun ivory towers and lead from the front. To do this, they need to be hands-on, learning about new technologies and marketing practices through real-life experience. Staying close to the comfortable, general manager style skillset of the past won't cut it.

Finally, we have CMOs who are evolving to become Chief Experience Officers, orchestrating entire ecosystems around their brands to pivot them towards the future. As the rules of engagement are rewritten brands are built not by broadcast, but by belonging – cultivating communities and curating a lifestyle. Experience CMOs join the dots across the organisation to enable richer brand journeys across public and private touchpoints. They are advocates for personal interaction, blending data-driven precision with human connection.

### **HOW CMOs CAN ADDRESS SKILLS GAPS**

There are practical first steps that CMOs can take now, to start building the skills needed for the future.

They can start by challenging themselves to embrace a new style of leadership. The qualities needed in a marketing leader are evolving to match the operational context. This means an increased focus on flexibility, efficient resource allocation and management of risk. Especially in companies where marketing hasn't historically been a driving force, CMOs must assert their strategic vision and demonstrate how they can be architects of growth.

They can also rethink how they lead relationships with partners

to support them in this. Forget transactional partnerships – the future demands strategic alliances.

Partners should be entrusted not just with routine operational tasks, as these are precisely the tasks that can be in-housed using AI to achieve new efficiencies.

Instead, external partners should be tasked with pushing the boundaries of innovation and taking on more cognitive, judgement-focused work. Third parties often have a greater ability to experiment with cutting-edge technology and to build up specialised capability. Winning CMOs should recognise this and build their own network of partners, challenging them to take

on risk and achieve leaps forward together.

CMOs can, and arguably should, also 'get their hands dirty'. This would see them immersing themselves in the latest tech rather than getting lost in the world of the boardroom and neglecting the front-line skills needed to win.

Reverse mentoring can be a powerful tool to enable that. No-one is too senior to stop learning and building practical skills, even if only to build professional familiarity rather than advanced knowledge. Without this, it's impossible for CMOs to truly hold their teams and partners to account and provide the leadership required.

**The CMO of the future isn't just an experienced operator. They are a hybrid leader, a marketing polymath. They will have the balanced combination of skills needed to wield data and technology with one hand and ignite creativity and innovation with the other. There are many models to do that successfully, but all require them to find equilibrium as both short-term stewards of the brand and long-term navigators of the future •**



# CONCLUSION





**The modern marketing landscape, as we've explored, forces a difficult balancing act upon its leaders – the persistent growth dilemma. CMOs stand squarely at the intersection of immediate performance pressures and the non-negotiable need for long-term strategic value creation. The temptation is often to prioritise one at the expense of the other, leading to short-sighted tactics that erode brand equity or lofty visions disconnected from commercial reality. Yet, our analysis reveals that this tension, while challenging, is not an insurmountable paradox. Instead, it presents a strategic opportunity for those leaders equipped to navigate it holistically.**

Resolving this dilemma requires moving beyond siloed thinking and embracing an integrated approach across the critical domains we've examined. Streamlining operations and harnessing technology, for instance, are not merely about cost reduction or chasing the latest innovations. They are fundamental to creating the capacity and agility required to execute effectively in both the short and long term. A well-oiled operational engine, powered by intelligently implemented MarTech, allows marketing teams to respond rapidly to market shifts and capture immediate opportunities while simultaneously building the robust data foundations and scalable processes needed for sustained growth and deeper customer understanding. This integrated capacity directly addresses the resource allocation tension inherent in the growth dilemma.

The paths to immediate customer satisfaction and long-term brand loyalty are converging.

True customer-centricity, expressed through authentic loyalty programmes and impactful, personalised content, delivers tangible value now – driving engagement, conversion, and positive sentiment. Simultaneously, these very actions build the enduring assets of trust, brand preference, and customer advocacy that fuel future revenue streams and competitive resilience. It's about recognising that delivering value consistently across the customer journey inherently serves both immediate performance metrics and the long-term health of the brand, dissolving the artificial wall between ROI and brand building.

However, achieving this synthesis is not automatic. It demands a specific kind of leadership. The 'Future-Fit' CMO is more than a functional expert; they are the strategic integrator, the vital orchestrator who ensures these different facets work in concert. They

possess the vision to see how operational improvements enable better customer experiences, how technology can amplify creative impact, and how content strategies must align with overarching business goals. Crucially, they possess the influence and cross-functional collaborative skills to embed this integrated thinking not just within marketing, but across the entire organisation. It is the CMO who must champion the business case for balancing investment, demonstrate the interconnectedness of short-term actions and long-term outcomes, and foster a culture that values both immediate results and sustainable growth. →



Ultimately, the growth dilemma is resolved **not by choosing sides** but by **mastering the interplay** between them.

By developing operational prowess, leveraging technology strategically, building genuine customer loyalty, creating resonant content, and embodying integrated leadership, CMOs can transform this central tension from a source of conflict into a dynamic engine for value creation. Those who successfully navigate this balance will not only elevate the marketing function but will position themselves as indispensable architects of the organisation's overall growth trajectory and future success.



Marketing Transformation 2023, The Marketing Society/Accenture Song, 2023

Accelerating growth with marketing effectiveness: A playbook, WARC, 2023

Burning Platforms Survey, November 2023, AAR & The Drum, 2023

FutureFwd: Emerging Tech & Media Innovation Trends Unveiled, PMCI, 2023

The CMO Survey: Highlights & Insights Report Fall 2023, Deloitte/Duke/AMA, 2023

The CMO Survey: Firm & Industry Breakout Report Fall 2023, Deloitte/Duke/AMA, 2023

The CMO Survey: Highlights & Insights US Report Spring 2023, Deloitte/Duke/AMA, 2023

The CMO Survey: Firm & Industry Breakout US Report Spring 2023, Deloitte/Duke/AMA, 2023

The CMO Survey: Firm & Industry Breakout UK Report Spring 2023, Deloitte/Duke/AMA, 2023

CMO Leadership Vision 2023, Gartner, 2023

2023 Global Marketing Trends, Deloitte Insights, 2023

What do City Analysts want to know about marketing?, WARC, 2023

The state of marketing budget and strategy 2023, Gartner, 2023

Creative Trends 2023, Dentsu, 2023

Life Trends 2023, Accenture, 2023

PwC Pulse Survey: Focused on reinvention Fall 2023, PWC, 2023

Growth and resilience through ecosystem building, McKinsey, 2023

2023 Annual Marketing Trends, Nielsen 2023

Consumer Trends Report, Marigold/eConsultancy 2023

Digital Connections 2.0: The customer is back, Modern, 2023

Marketers Toolkit 2024, WARC 2024

2024 Annual Marketing Report, Nielsen 2024

Sustainability Marketing Trends in 2024, Warc, 2024

CMO Spend Survey Data Snapshots, Gartner, 2024

Burning Platforms: How CMOs are navigating a changing marketing ecosystem, AAR & The Drum, 2024

Life Trends 2024, Accenture Song, 2024

Blueprint for Brand Growth, Kantar, 2024

Kantar Marketing Trends, Kantar, 2024

Marketing Predictions, Gartner, 2024

Seize the moment: Unleashing America’s full potential..., Havas/Meaningful Brands, 2024

2023 Review & 2024 Trends, Publicis Commerce, 2024

What’s important to CMOs in 2024, PWC, 2024

The Future 100, VML Intelligence, 2024

The CMO Survey: Highlights & Insights Report Spring 2024, Deloitte/DUKE/AMA, 2024

The CMO Survey: Firm & Industry Breakout Report Spring 2024, Deloitte/DUKE/AMA, 2024

CMO Spend and Strategy Survey, Gartner, 2024

Lost in translation: Three ways marketers can bridge the gap between the city and the c-suite, WARC, 2024

Creative Trends 2024, Dentsu, 2024

PwC Pulse Survey: Finding opportunity in reinvention, PWC, 2024

2024 Annual Marketing Report, Nielsen, 2024

Where AI and Marketing Collide: 2024 CX Predictions, Acxiom, 2024

The Future of Creativity, AdWeek Branded/Frontify, 2024

5 Technology Trends Marketers need to know in 2024, AWS/Trendhunter, 2024

What matters to today’s consumer, CapGemini, 2024

Contagious Radar Report 2024, Contagious Radar, 2024

Global Consumer Trends 2024, Marigold/eConsultancy, 2024

Best Global Brands 2023, Interband, 2024

Best Global Brands 2024, Interband, 2024

Global Consumer Trends, Mintel, 2024



Activate Technology & Media Outlook 2024, Activate, 2024

eCommerce Insights, ChannelSight, 2024

State of UK Business 2024: Emerging Optimism, BCG, 2024

Digital Connections 3.0: Martech’s strategic skills dilemma, Modern, 2024

The top priorities and challenges of CMOs in 2024, The CMO, 2024

Econsultancy’s digital and marketing trends for 2024, Econsultancy, 2024

CMO Insights, Deloitte UK, 2024

State of Marketing 2024, Hubspot/Rock Content, 2024

Value of measurement, DMA, 2024

AXA Foresight Report: 100 Reasons to Love the Future, AXA, 2024

Personalization: It’s a value exchange between brands and customers, Deloitte Digital, 2024

The Marketing Transformation Report 2024, The Marketing Society/Accenture Song, 2024

The CMO Survey: Highlights & Insights Report Fall 2024, Deloitte/Duke/AMA, 2024

The CMO Survey: Firm & Industry Breakout Report Fall 2024, Deloitte/Duke/AMA, 2024

The Marketer’s Toolkit 2025, WARC, 2025

Life Trends 2025, Accenture Song, 2025

Kantar Marketing Trends, Kantar, 2025

The Gartner Top Marketing Predictions for 2025: AI’s Impact Creates New Mandate, Gartner, 2025

2025 Trends and Predictions, Publicis Commerce, 2025

What’s important to CMOs in 2025, PWC, 2025

The Future 100: 2025, VML Intelligence, 2025

CMO Leadership Vision for 2025, Gartner, 2025

Creative Trends 2025, Dentsu, 2025

Life Trends 2025, Accenture, 2025

2025 CX Predictions: A Human Centered Approach to Customer Experience, Acxiom, 2025

What matters to today’s consumer 2025, CapGemini, 2025

The Contagious Radar Report 2025, Contagious Radar 2025

2025 Global Consumer Trends, Mintel, 2025

Eight digital and marketing trends for 2025, Econsultancy, 2025

State of Marketing 2025, Hubspot/Rock Content, 2025

Embracing change and gearing up for the future, Deloitte Digital, 2025

What’s Next Trend Report, TikTok, 2025

2025 E-commerce outlook: Key trends poised to make an impact, FedEx, 2025

The year of impact 2025 Media Trends, Dentsu, 2025

Must-Watch Consumer Trends 2025, Statista, 2025

Digital 2025: Global Overview Report, Meltwater, 2025



# RECOGNITION AND APPRECIATION

The creation of “The CMO Balancing Act” was a collaborative effort, drawing on the expertise and dedication of many within Deloitte Digital. We thank everyone who helped make this report a practical resource for marketing leaders.



**Perrine Masset**

*Partner Sponsor*  
perrinemasset@deloitte.co.uk



**Andy Sandoz**

*Partner Sponsor*  
asandoz@deloitte.co.uk



**William Grobel**

*Project Director*  
wgrobel@deloitte.co.uk



**Jono Craven**

*Project Manager*  
jonocraven@deloitte.co.uk



**Jennifer Holland**

*Insight Manager*  
jdholland@deloitte.co.uk



**Douglas Gunn**

*Assistant Insight Manager*  
dgunn@deloitte.co.uk



**Henry Elphick**

*Design Lead*  
helphick@deloitte.co.uk



**Anna Mikkelsen**

*Designer*  
anmikkelsen@deloitte.co.uk





This publication has been written in general terms and we recommend that you obtain professional advice before acting or refraining from action on any of the contents of this publication. Deloitte LLP accepts no liability for any loss occasioned to any person acting or refraining from action as a result of any material in this publication.

Deloitte LLP is a limited liability partnership registered in England and Wales with registered number OC303675 and its registered office at 1 New Street Square, London EC4A 3HQ, United Kingdom.

In this publication, references to Deloitte are references to Deloitte LLP. Deloitte LLP is the United Kingdom affiliate of Deloitte NSE LLP, a member firm of Deloitte Touche Tohmatsu Limited, a UK private company limited by guarantee (“DTTL”). DTTL and each of its member firms are legally separate and independent entities. DTTL and Deloitte NSE LLP do not provide services to clients.

Please see [www.deloitte.com/about](http://www.deloitte.com/about) to learn more about our global network of member firms.

© 2025 Deloitte LLP. All rights reserved.