



Ekimetrics.

THE CMO TENSION

Perspectives from Marketing & Business Leaders across APAC



A WORD FROM OUR CEO:

GROWING PAINS & RELIEVING THE TENSIONS

At The Marketing Society, we've long been clear that marketing is the key driver of growth in business. As marketers, we listen to potential customers and find out their wants and needs. We work with other departments to capitalise on the opportunities those wants and needs create. Finally, we're the ones who present the resulting products or services back to consumers, creating growth.

Increasingly though, as we talk to our members across the world, we hear the same thing. The biggest source of tension CMOs face is bridging the gap between the business's ambition to grow and the reality of delivering that growth.

There are many reasons why this is such a challenge. Partly it's because consumer behaviours change so quickly and partly it's because the media landscape is so much more diverse and fragmented than it used to be. And each new channel doesn't just add complexity; it multiplies it. And most importantly, in a region the size of APAC, it's because both those factors (and many others) vary significantly from market to market.

Alongside these external factors, equally powerful forces are at work within the organisation.

As this report makes clear, these tensions play out across multiple dimensions. From AI vs. people, creativity vs. scale and automation, to data availability vs. decision clarity, measurement vs. fragmented ownership, and the ongoing pressure between short-term ROI and long-term brand value. They are also reflected in how organisations operate, from silos vs. openness to the challenge of evolving today's structures to meet tomorrow's demands, and the constant balance between effectiveness and efficiency.

And, of course, all these tensions interact. Some may reduce the significance of others; some may make things worse. But the CMO must manage them all.

What is The CMO Tension?

We wanted to share how other CMOs are thinking about these tensions in their daily lives. We've brought together an impressive line-up; 14 marketers from 13 organisations, including some of the biggest in the world and all of them are, in every sense, marketers who mean business. I hope you find their insights challenging, thought-provoking and useful.

Several interviewees described marketing as being between the end of one cycle and the beginning of the next, with all the uncertainty that implies. So, it's reassuring that so many agreed that the fundamentals of marketing remain constant. What changes, and what will continue to change, is how we apply those fundamentals. And the best way to learn how to do that is from each other.



- Sophie Devonshire

*CEO,
The Marketing Society*

A WORD FROM OUR PARTNER: FROM TENSION TO TRACTION

Marketing leaders today are not short of ambition, data, technology, or pressure. What they are short of is clarity.

Across markets and sectors here in APAC, we observe CMOs navigating similar tensions: the need to deliver immediate sales impact while building brands that will still matter in five, ten or 20 years' time. This tension is not novel, but it has become more acute. Data abundance, channel and platform fragmentation, performance culture, and changing consumer behaviours have accelerated decision making cycles while shrinking patience for long term returns.

At Ekimetrics, we strongly believe this is the defining leadership challenge for modern marketing; not choosing between short term and long term performance but orchestrating both through better decision making.

Decades of empirical evidence, across categories, geographies and economic cycles, show that sustainable growth is driven by the compound effect of brand and activation working together. Yet organisational complexities, siloed and unaligned objectives, KPIs and ROI often pull teams in the opposite direction, rewarding what is easy to measure rather than what truly creates value and impact.

This is not a technology problem. Nor is it a creativity problem. It is a decision problem.

Technology, AI and data have enormous potential, but only when grounded in robust measurement frameworks, shared definitions of success and a clear understanding of how marketing drives business outcomes over time. Without this foundation, organisations risk mistaking efficiency for effectiveness, optimisation for transformation.

This report brings together APAC senior marketing leaders who are living this reality every day. Their perspectives reflect an important shift taking place across the profession: from marketing as execution to marketing as a strategic growth engine, one that requires ROI confidence, evidence and alignment across the organisation.



- *Olivier Kuziner*
Managing Partner, APAC,
Ekimetrics

CONTRIBUTORS



Alvin Neo

Chief Customer & Marketing Officer, FairPrice Group



Allen Cai

CMO, Greater China, Nestlé



Celine Sciortino

Group VP Brand & Marketing, FWD Insurance



Edward Bell

General Manager, Brand, Insights and Marketing Communications, Cathay Pacific



Eugene Lee

Chief Marketing Officer, CHAGEE, APAC



Gaurav Datta

Global Brand Vice President, Personal Care, Unilever



Haymans Fung

Managing Director, Global Head of Wealth and Retail Bank Marketing, Standard Chartered



Jack Foley

Chief Marketing Officer - KFC, South Asia, Yum! Brands



Jeremy Lee

Head of Middle East and South Asia, Pop Mart



Julie Nestor

Executive Vice President, Head of Marketing & Communications APAC, Mastercard



Lex Bradshaw-Zanger

Chief Marketing & Digital Officer, SAPMENA, L'Oréal Groupe



Nadia Touil Louis

Head of Digital Marketing & eCommerce - Asia Oceania Africa Middle East, Nestlé



J. Oliver Braunoeder

Marketing Director APAC, Lacoste



Stephanie Ng

Managing Director, Global Head of Marketing, International Wealth and Premier Banking, HSBC

TABLE OF CONTENTS



06 Introduction

Setting the context for how marketing has become more complex and the tensions CMOs are navigating today

08 Organisational complexity

Exploring the internal tensions shaping marketing today, from growth vs. efficiency to measurement and ownership

12 Technology has yet to live up to its promise

Examining the gap between AI's potential and reality, and the balance between automation and human judgement

17 Solutions & next steps

How CMOs can navigate complexity; building alignment, improving decision-making, and evolving operating models

21 Conclusion

Exploring the internal tensions shaping marketing today, from growth vs. efficiency to measurement and ownership

23 Five key takeaways

The most important actions for marketing leaders to focus on

INTRODUCTION

Marketing is hard. It's hard to deliver against the organisation's ambitions for success. And one of the main reasons is because it's competitive. As Gaurav Datta, Global Brand Vice President, Personal Care at Unilever put it: "Our job is to create brands which people love a lot more than whatever else is available on the shelf."

But, as he also said: "That job is not changing. It's about how we get it done." The tension between this fundamental task of marketing and its execution in a world of constant change is what this report is all about.

In fact, our interviewees were unanimous. Marketing is harder now than it has ever been. Not because marketing itself has changed, but because the context has changed so much:

- Media choice has grown exponentially. There are far more channels, platforms and touchpoints. This makes campaign orchestration much more difficult.
- What was once a trickle of data is now a firehose. The challenge now is measurement. Are we measuring what's meaningful, or simply what's easy? Do we have a consistent framework and common language across the entire organisation that relates to our



"The tension between pressure for growth and execution is the frame, not the picture."

*- Lex Bradshaw-Zanger,
Chief Marketing & Digital Officer, SAPMENA, L'Oreal Groupe*

KPIs? Do we have the resources and capabilities to make sense of the resulting data and to derive actionable insights from it?

- Consumer expectations have changed. They now expect more personalised solutions, delivered in real time. They are also less loyal, tempted as they are by a greater selection of competitor brands only a click away.
- Competition has increased as technology fosters innovation and lowers the barriers to entry.
- Technological advancement continues unabated, with AI promising the latest revolution.

INTRODUCTION

This complexity is made worse for multi-national organisations by the tension between global and local thinking. APAC businesses feel this particularly, because of the region's complex history, profusion of languages and cultures, and diverse markets.

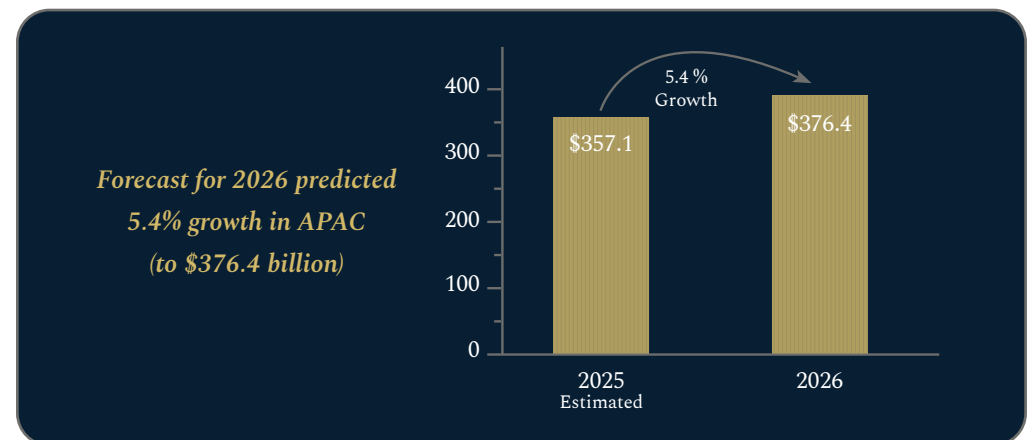
"In APAC there is no one-size-fits-all solution. Some markets are very mature, for example South Korea and Japan," explained J. Oliver Braunoeder, Marketing Director APAC, Lacoste. "But there are a lot of emerging markets. Brands will sometimes have different positioning in these different markets. The challenge is to stay consistent from a global perspective and still make the brand relevant locally."

This view was reinforced by Nadia Touil Louis, Head of Digital Marketing & eCommerce – Asia Oceania Africa Middle East, Nestlé.

"One way for companies to implement strategy is to go into the simplest models, to go for end-to-end efficiencies, and try to standardise and automate everything. However, the situation we are facing right now is that we have local markets where sometimes that standardisation doesn't work."

Meanwhile, although Dentsu's Global Ad Spend Forecast for 2026 predicted 5.4% growth in APAC (to \$376.4 billion), many of our interviewees said their own budgets were not keeping pace with the growth of their businesses. As one told us: "More and more management expects one plus one equals four or five. It's not even one plus one equals three anymore. So, expectations are higher, but resources are very stretched."

This report, produced by The Marketing Society in partnership with Ekimetrics, brings together 14 senior marketers from a wide range of sectors and markets to talk about the tensions they face. They discuss how they're driving growth, the barriers they face in doing so, and the changes that would make their jobs less difficult.



ORGANISATIONAL COMPLEXITY

There is a clear line joining ambition and success in business. Ambition sets the goals of the organisation. Strategy defines how those goals are to be achieved. Departments – including marketing – establish their own contributions to that strategy. Then individual teams carry those contributions out.

None of this works if the strategy isn't conveyed clearly to the departments. Anything else creates significant tension.

“Everything has become more complex, but the markets where we see the strongest performance are where there's a focused strategy,” explained Jack Foley, Chief Marketing Officer – KFC, South Asia, at quick-service restaurant giant Yum! Brands. “You need to be able to explain your strategy briefly and coherently, in a way that not only your marketing team can remember, but also your finance team, supply chain team, operations

team, and so on. Then you've got the biggest chance of success and growth.”



Jack Foley

*-Chief Marketing Officer KFC,
South Asia, Yum! Brands*

Our interviewees talked about the difficulty of communicating strategy across departments and geographies. Jeremy Lee, Head of Middle East and South Asia, Pop Mart, believes how well information is communicated across an organisation is vital to success.

“Whatever the reason, you often realise there's been a lack of information or some misinformation, and then certain decisions go off-track. It's only later that you find out that you didn't have all the information you needed.”

According to Louis, Nestlé's top-down approach delivers strategic clarity, which

flows smoothly into individual markets. Execution, however, requires recalibration due to its growing complexity. She gives the example of the company's approach to retail media.

“Retail media has so far been very much a sales channel,” she said. “But today we're trying to incorporate this media investment into the bigger framework of media that also contributes to brand equity. So where should the decisions be made? Are they marketing decisions? Sales decisions? Both? And where does media then get involved?”

“So, strategy is clear but sometimes execution is blurry because of the environment we're in today. It's no longer marketing versus sales, because those touchpoints now cross and blend. You don't talk about sales versus marketing, you talk about e-business, for example.”

ORGANISATIONAL COMPLEXITY

Can CMOs deliver short-term efficiency without sacrificing long-term growth?

The need to balance growth with efficiency is another internal area of tension for CMOs, as Alvin Neo, Chief Customer & Marketing Officer at retail business FairPrice Group, pointed out.

He believes one effect of this tension is to force marketers to do two jobs at once, stretching resources. But the bigger challenge is that increased emphasis on efficiency pushes marketing further down the funnel. More performance marketing, less brand-building; potentially impacting long-term growth. Sustainable success requires maintaining balance between driving Sales Overnight and building Brand Over Time (SOBO).

Edward Bell, General Manager, Brand, Insights and Marketing Communications at airline Cathay Pacific, agreed. He argues

that marketing has slipped down the funnel because of the allure of immediate returns and measurable sales.

“A lot of marketing these days is sales activation pretending to be marketing,” he said. “It’s not focused on future demand; it’s dealing with the minority of the people who are in the market to buy right now. Now the lower funnel’s become so easy, we’ve refocused away from the bigger picture.”

It’s a classic example of the struggle between long-term and short-term thinking. Or rather, the failure to recognise that the two go hand in hand.

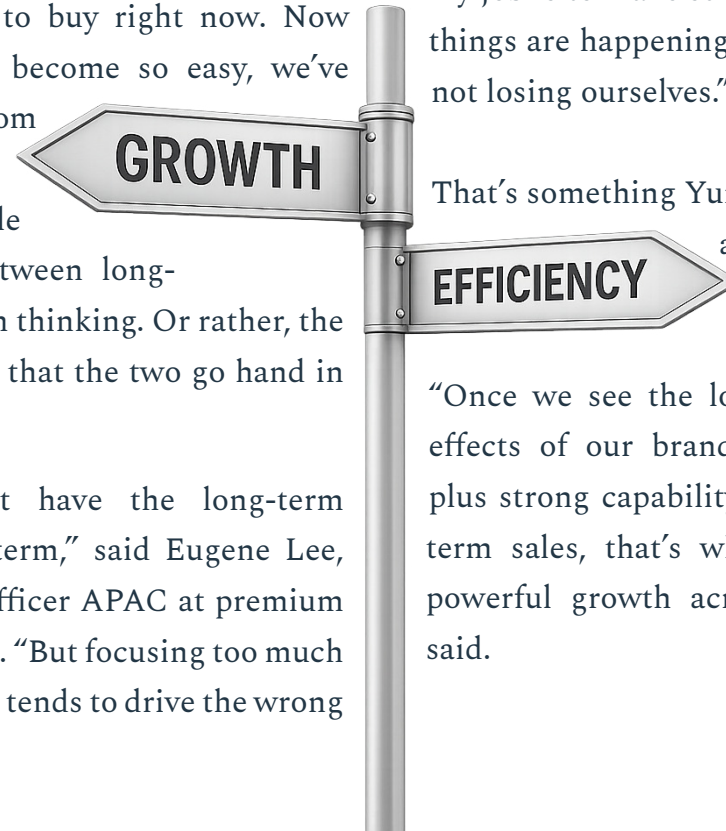
“Clearly you can’t have the long-term without the short-term,” said Eugene Lee, Chief Marketing Officer APAC at premium tea brand CHAGEE. “But focusing too much on tomorrow’s sales tends to drive the wrong

behaviours. When you’re always worried about next week or next month, the mindset becomes: “Can we do something quick and dirty to get customers in?” So the business starts to rely on promotions and price cuts.

“Short-term is always going to be top-of-mind. My job is to make sure we understand these things are happening, but balance that with not losing ourselves.”

That’s something Yum! Brands’ Foley agrees with. And he’s seen the power of it in action.

“Once we see the long-term compounded effects of our brand-building investment, plus strong capability in driving our short-term sales, that’s when we see the most powerful growth across our markets,” he said.



ORGANISATIONAL COMPLEXITY

Who owns measurement when growth depends on the whole business?

A big part of the problem is still how activity in the different parts of the funnel is measured, as Lacoste's Braunoeder pointed out.

"What will help us to get more precise and, in the future, hopefully more holistic, is that we are beginning to adopt a full-funnel thinking approach," he said. "From there, we'll be able to define dedicated KPIs for each stage of the funnel, align them with overarching organizational goals, and use these KPIs to measure campaign performance and enable meaningful comparisons on a global level."



J. Oliver Braunoeder

*-Marketing Director
APAC, Lacoste*

Julie Nestor, Executive Vice President, Head of Marketing & Communications APAC at Mastercard, pointed out that businesses that rely on lower-funnel activity are usually more disciplined about measurement than those that are more focused on brand-building.

"When you're in an organisation where your margins are very low and you're under massive short-term sales pressure, you tend to be very clear on what the KPIs and measurements need to be," she said. "In the past, marketers from brands that just measure long-term brand value, for example, haven't had the same rigour around measurement."

Nestor describes Mastercard as rigorous in its approach to investment.

"Regardless of what the KPI is, a business case is always required," she explained. "That's just a standard part of our practice globally. Then measurement is always aligned to the business goals."

"It's important that we always develop a business case with the measurement being aligned to the business metrics such as direct revenue, increased card acquisition or increases spend per transaction. We don't focus measurement on impressions or clicks or anything that the business is going to have difficulty in linking to direct ROI."

ORGANISATIONAL COMPLEXITY

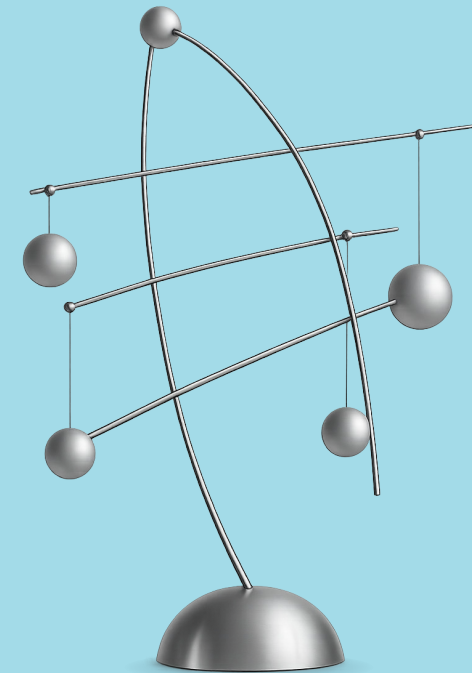
From an Ekimetrics' perspective, the short term versus long term debate is often framed incorrectly. The question is not whether to invest in brand or performance, but how to allocate resources dynamically based on their respective roles in value creation.

Long term brand building and short term activation are not competing objectives; they operate on different time horizons and affect different parts of the demand curve. Brand investment expands the size of the future buyer pool, improves price elasticity, and increases the efficiency of activation over time. Activation converts existing demand but only as long as there is sufficient brand equity to draw from.

Our research consistently shows three structural issues behind the growing imbalance toward short termism:

1. **Measurement asymmetry** – Short term effects are easier to observe, even when they are overstated. Long term effects are harder to measure, not weaker.
2. **Organisational misalignment** – Budgets, KPIs and incentives are often owned by different functions, pulling decisions toward the lower funnel.
3. **Decision compression** – Faster reporting cycles encourage immediate optimisation at the expense of strategic learning.

Brands that escape this trap do not rely on faith in long term marketing. They rely on evidence based frameworks that make long term impact visible, credible and comparable to short term returns. When long and short term are measured together, alignment follows across markets, functions and leadership teams.



TECHNOLOGY HAS YET TO LIVE UP TO ITS PROMISE

One of the great ironies of the internet era is the hope for each new wave of technology, to save us from the problems created by the last one. For example, the problem of insufficient data was solved in the 2010s. Now we're looking to AI to solve the problems of data overload.

Jeremy Lee, Head of Middle East and South Asia, at designer collectible and entertainment company Pop Mart, summed up the current situation: "In our day and age, it's impossible to say you don't have enough data. If anything, we have way too much. And there are two issues. Number one, we're not keeping good data and therefore the data can't be used. And

number two, we don't have someone to analyse the data, make sense of it, and understand how that data can then be used to provide insights." This is one of the most established marketing use cases for AI.

This is one of the most established marketing use cases for AI.

"Right now we have all these pockets of data and we are hoping that with agentic AI we can pull all the data from different places and massage it with the algorithm and answer our campaign questions or business questions or business planning questions more easily," FairPrice Group's Neo explained.

"In the past you would have had all these as different human teams, like market research, sales, R&D, the factory and all that. But now your AI agent will talk to the AI of all these

different departments and very quickly be able to connect the dots."

Beyond the data issue, our marketers talked about other ways in which AI has already been internalised within their business. Stephanie Ng, Managing Director, Global Head of Marketing, International Wealth and Premier Banking, HSBC, reported that her team is using it "as a writing assistant supporting content creation, copywriting, and as a thinking partner. It's all about how we implement AI to help us optimise and be more efficient across the work streams."



Jeremy Lee

-Head of Middle East and South Asia, Pop Mart



Stephanie Ng

-Managing Director, Global Head of Marketing, International Wealth and Premier Banking, HSBC

TECHNOLOGY HAS YET TO LIVE UP TO ITS PROMISE

Similarly, Haymans Fung, Managing Director, Global Head of Wealth and Retail Bank Marketing at Standard Chartered explained how Gen AI is now seen as a “basic tool” in her department, and among the agencies she works with.

“I really want the team to be able to use AI on an end-to-end basis,” she said, “from doing research, to writing the brief, to generating content, to measuring results, and then retargeting. We’re going through the process of making sure we have the right tools for them to do so.”



Haymans Fung

-Managing Director, Global Head of Wealth and Retail Bank Marketing, Standard Chartered

Another financial services marketer, Mastercard’s Julie Nestor, welcomes AI’s potential to create thinking space for marketers.

“The job of a marketer is often to dream and to create a vision, but sometimes we get lost in the execution and the day-to-day,” she said. “This tool allows marketers to go back to creating strategic narratives, to thinking about new ideas quickly without having to get an agency on board to run a two-day workshop.



Julie Nestor

-Executive Vice President, Head of Marketing & Communications APAC, Mastercard

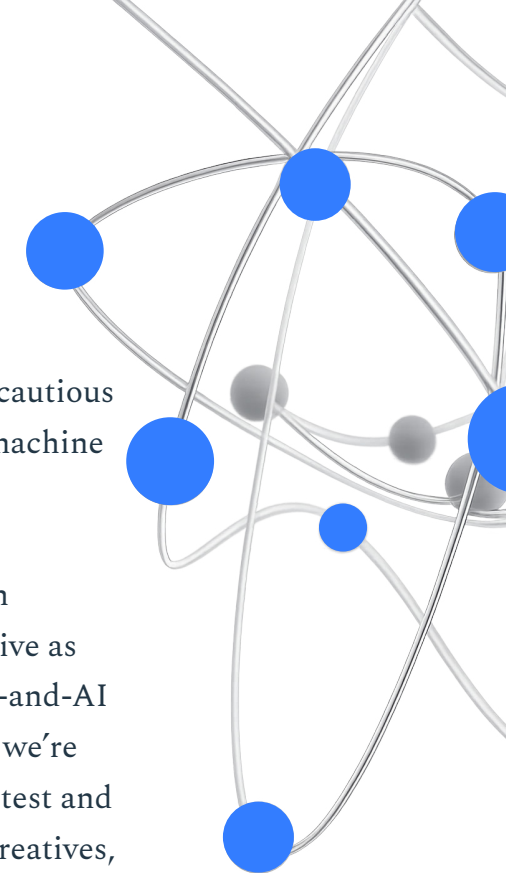
“Then obviously there’s the increased effectiveness and efficiency of completing basic tasks, like budgets, team planning, writing job descriptions, and writing marketing copy. All these mundane administrative components

have been massively shortened and improved.” However, there is also significant caution around AI. HSBC’s Ng is concerned about how to plan the use of Large Language Models (LLMs) in the future before their present impact can be properly assessed.

“There are plenty of LLMs around, and they’re all trained differently,” she said. “That’s a source of tension for me because while it’s an area we need to focus on, there is no signal or feedback that tells me if we’re doing it right. There are no signals from LLMs coming back to advertisers or to us to tell us whether we’re optimising the right way.

“That’s the biggest tension from a marketing standpoint. How can you plan and ask for investment to future-proof the business when you can’t measure what’s happening, and you still have to ensure you’re delivering for the now.”

TECHNOLOGY HAS YET TO LIVE UP TO ITS PROMISE



Where should automation stop and human creativity take over?

Creativity is another controversial area. At CHAGEE, Eugene Lee is enthusiastic about the potential of AI to speed up the creative process.

“Something AI is helping us with right now is the ability to ideate a lot quicker and to visualise our brainstorm and discussions. We’ll have a 30-minute discussion to work out the key words in terms of what the campaign is going to look like. Then we plug all those keywords into gen AI to visualise. That gives us a starting point to ask whether what we’ve got feels right, then we hand it over to the humans.”



Eugene Lee

-Vice President, Chief Marketing Officer, CHAGEE APAC

But Neo at FairPrice Group warned against expecting AI to come up with anything genuinely new and surprising.

“Creativity means being able to think of things that are not conventional, that are differentiated and that break the mould,” he said. “Because the AI knows what has happened in the past and what is happening out there now, it will bring back to you what the market does. So it will be good, but it may not be great.”



Alvin Neo

-Chief Customer & Marketing Officer, FairPrice Group

At FWD Insurance, Group VP Brand & Marketing Celine Sciortino also stressed the importance of human involvement in creativity. But she is also finding that her

creatives are cautious about human/machine collaboration.

“My team has been incredibly supportive as we explore human-and-AI collaboration, and we’re moving quickly to test and learn. Like many creatives, they’re thoughtful about protecting what makes our work feel authentic, especially around how natural the output is and whether the people in images feel real but we’re addressing those concerns head-on and building confidence through fast, practical experimentation.”



Celine Sciortino

-Group VP Brand & Marketing, FWD Insurance

TECHNOLOGY HAS YET TO LIVE UP TO ITS PROMISE

Nestlé's Louis takes a much stronger line. Nestlé, she says, doesn't want to dilute all the great work done on the brand front just because everyone's excited about AI.

"If you ask AI to build a strategy for the brand, believe me, it will suck. Why? Because all the brands would look the same. Nestlé and its competitors would look the same. But Nestlé's success is based on the unique brands we've built over the century. So, while we have this big AI wave coming, which we welcome, we are doubling down on the investment in marketing knowledge.

"All our teams have embraced AI where they can, and they continue to do so, typically in day-to-day operations," she added. "But when it comes to the DNA of marketing, we are not letting AI overtake our work."

Using data analysis as an example, Lacoste's Braunoeder summed up the need for people and AI to work together.

"The risk that we might run into with AI is that, if we have AI, we don't need the manpower to do analysis," he said. "But an analysis from AI can only be as good as the prompt you give it. So it's also about equipping the manpower with the right skills and making sure that person can work together with an AI tool. One cannot replace the other. The two need to go hand in hand to come to a credible and reliable result."



Nadia Touil Louis

-Head of Digital Marketing & eCommerce - Asia Oceania Africa Middle East, Nestlé

Allen Cai, CMO, Greater China, Nestlé, agreed.

"When machine-generated content is excellent, it's based on excellent input," he said. "The human touch still makes a huge difference. The more you rely on technology, the more time you actually end up spending observing human behaviour."



Allen Cai

-CMO, Greater China, Nestlé

TECHNOLOGY HAS YET TO LIVE UP TO ITS PROMISE

The revolution of generative AI has been accompanied by an intense focus by organizations on productivity gains, with claims of up to 30% savings in staff costs. But let's be clear; the creation of business outcomes is undeniably the true challenge. We believe that it is a critical mistake to assume we can significantly stretch the cost structure further without damaging value.

From Ekimetrics' point of view, when it comes to AI technology, LLMs are not the solution. Neither are the agents, nor will the next tech hype be.

We see another pitfall in overstating the reasoning ability of LLMs as mimicking that of humans. LLMs might be the most powerful AI tools ever created, but they are still based on probabilistic models which require the rules of decision-making in a business context to be articulated.



And while reasoning is one thing, it's far from enough. Real differentiation comes from singularity. Two companies in the same industry will have unique histories, cultures, and "horizontal" differentiators (think about the importance of design today). This differentiation is also evident in how they operate every day. In AI, one size does not fit all. Plausible answers, no matter how brilliant, can't capture this kind of context.

That's why LLMs are not a competitive advantage in and of themselves and will fail to deliver exceptional business value, just as SaaS products failed before them. The true competitive advantages are in the brands, products, and customer experiences. AI is just a tool to amplify, reinvent, or disrupt a company's identity.

SOLUTIONS AND NEXT STEPS

One of the perennial sources of tension for CMOs is the relationship between marketing and the C-suite. How much confidence does senior management have in the CMO and their department?

As Edward Bell at Cathay Pacific put it: “Most organisations tend to bias toward sales, towards people who can bring in revenue. It can take a lot of courage or organisational authority for marketing teams to have a counter-narrative. It also takes the ability to succinctly and persuasively articulate the rationale for investing in something that may pay off in the longer term but also may not.”



Edward Bell

-General Manager, Brand, Insights and Marketing Communications, Cathay Pacific

How responsive the leadership is to marketing’s challenges also varies very much

by sector, according to Bradshaw-Zanger at L’Oréal Groupe.

“I work for a company that is very marketing-centric,” he said. “We’re a CPG and CPGs understand marketing, understand what it drives and what it delivers. If you work in banking or financial services or construction, these may be less marketing-centric businesses, so it’s harder.”

CHAGEE’s Eugene Lee recalled the biggest change from his previous job was the level of trust the leadership has in the organisation.

“When I sat down for my interview with the founder, he entrusted me to do what was right for the brand to bring it to life across multiple markets. And that level of trust trickles down through the organisation.”

Cross-departmental trust and cooperation can also be an issue. Fung at Standard Chartered

told us that she doesn’t struggle making the business case for her programmes. Rather, her biggest challenge is getting other departments to commit to those programmes once they go ahead.

“I’ll be investing a certain amount of marketing money alongside my business team to do maybe an event, or a marketing campaign. And if I spend this amount of money, I need to look at the ROI, but I’m not the one who is driving the ROI. So, I need to work with the business team very closely and they would need to commit.”

Some of us are fortunate enough to work in an existing culture of trust. For the rest, building close relationships across the organisation is a vital part of the CMOs role. HSBC’s Ng explained the way she does this, which is based on consistent sharing of both targets and results.

SOLUTIONS AND NEXT STEPS

“Having that feedback loop into the business on how we contribute to business outcomes becomes super-important,” she said. “It’s critical in establishing trust and confidence among our stakeholders in marketing. And it’s not a one-off thing; you’ve got to do it consistently.

“Once they believe you care about and understand real business outcomes, they are more willing to be your advocates and partners. They’ll also lobby for more investment to enable great marketing initiatives to happen.”

How do CMOs build trust beyond the marketing department?

But, as Ng implies, the whole effort hinges on having metrics that are meaningful outside the marketing department. Hence the growing focus on cross-business KPIs tied to business

outcomes. In HSBC’s case, the marketing department carries business targets for every initiative it pursues, what Ng refers to as “having skin in the game”.

However, these KPIs also must recognise the duality of marketing’s role, the balance of long- and short-term discussed by Edward Bell above.

“We’ve made big progress in this at Cathay,” Bell added. “We now have brand consideration as a top-level KPI that sits as part of our success targets. But as we all know, a willingness to consider is not always seen as quite the same as something like ROI.”

Even when a business is setting organisation-wide KPIs that then ladder down to individual departments and teams, measurement remains a challenge. Once again, the issue of short-

term versus long-term rears its head.

At Standard Chartered, Haymans Fung sees this tension in terms of digital and non-digital channels.

“In digital channels, we can measure every step of the way” she says. “It’s at the top of the funnel, in the Prime and Engage stages, that I don’t know whether I have the right measurement or not. Sometimes it’s just a matter of faith from my management.

“I’ve done this job long enough to know that when you don’t have hard data, people will challenge you. Sometimes you just need to be accountable and confident, and tell them what you’ll be able to achieve, if they give you the time and the money.”

This issue was also highlighted by Bradshaw-Zanger of L’Oréal Groupe.

SOLUTIONS AND NEXT STEPS

“Marketing is in an interim period. Data and technology have not delivered everything they promised, but CFOs tend to think everything can now be measured. So you need to explain every single dollar of investment. And that’s difficult because we’re not quite there yet.”

What kind of marketing organisation is fit for the future?

Beyond all this, businesses need to think about the difference between the organisation as it exists now, and what will be needed in the future.

Unilever’s Datta believes that businesses need to be able to move quicker.



Gaurav Datta

*-Global Brand Vice President,
Personal Care, Unilever*

“For large companies like us, that agility needs to come from the top,” he said. “I need to talk to my counterparts in-market more regularly and make more decisions faster in alignment with them. Letting it happen through the organisational hierarchy is too slow. The results come too late, and it puts too much pressure on the hierarchy because some of these decisions are so complex.”

It’s a view shared by Sciortino at FWD Insurance. One of her aims for the future is to build a more open, more nimble team, one that’s more open to experimentation.

“FWD is a challenger brand,” she said. “In my team we have people with a challenger mindset. So, in my team at least, experimentation should be easier, because I have people coming from different industries, from agencies. They have that startup spirit.”

“Imaging the future, we cannot just start from where we are and build towards it,” FairPrice Group’s Neo concluded. “We need a clean sheet. We need to start in the future and work backwards. That means not thinking about our current people. When we go from the future back, we start to see how we bring in the human beings and the capabilities that will be required to bridge to this future.”

“We won’t create a successful future by linear upgrading of the present,” FairPrice Group’s Neo concluded. “Start with a clean sheet. Imagine the end state without constraints, then work backwards to bridge with intent. That’s where the pragmatic truth emerges, how humans and platforms integrate, and what capabilities, structure, and innovation it will take to get there.”

SOLUTIONS AND NEXT STEPS

To echo the above, we at Ekimetrics observe that most organisations are still very siloed, both horizontally but also vertically. Thus, they still embed a compartmented way to look at the business performance, entailed by a department-by-department set of KPIs.

In this context, it is vital for organizations to establish a common framework to measure the performance across the board, and more importantly to adopt a common “language” of performance measurement, epitomised by a common view of ROI. Without a shared language of incrementality and value creation, trade-offs within organisations remain invisible until after execution.

Enterprises need a common decision framework; one that links strategy and tactics to growth and margin across horizons. Linking back to marketing, from our experience, there are five conditions, to assess whether marketing effectiveness capability is truly decision-grade:

- Shared performance definitions
- Governance integration
- Clear decision rights
- Scenario planning before execution
- Continuous learning loops



The winning organizations are those with the most aligned decisions. They'll test scenarios before investment, understand the incremental impact of shifting spend, pricing, or portfolio strategy, and ensure that short-term execution reinforces long-term value creation.

CONCLUSION



It's easy to feel that marketing is at an inflexion point. AI is transforming what we do, and that transformation shows no sign of slowing down. But perhaps the clearest message from our interviewees is that, in fact, the fundamentals of marketing remain the same. It's the environment in which we implement them that's changing.

As Sciortino at FWD Insurance put it: "Innovation with AI only works when creativity leads, data guides and technology amplifies. Nothing replaces the marketing fundamentals."

Yum! Brands' Foley agreed. "AI should be the facilitator, not the decision maker," he said. "It can help with research, insights, and synthesis, especially around driving governance and consistency. But you still need human input along each stage of the journey."

This has two significant implications. Firstly, employees need to understand and accept what AI can do, and how it should, and shouldn't, be used. That's not solely a training issue. It's also a question of winning over the doubters; the people who are emotionally opposed to AI, almost to the point of celebrating its failures.

"At the individual level, everyone's learning at a different pace, and wondering where they fit into this AI journey," said Pop Mart's Lee. "We're encouraging people to learn at an individual level. We want them to figure out how AI works, how it can help them in daily tasks and make completing those tasks more efficient."

At the same time, marketers need to be equally clear-eyed about the limitations of AI, as well as its strengths. Cathay Pacific's Bell reported seeing tension developing between the things AI is involved in, and those it isn't. And this tension is worsening the divide between long- and short-term thinking.

"It's repositioning all the non-AI things as being less efficient and as being less productive," he said. "It's changing the narrative to focus on efficiency as the watchword. But for marketing, effectiveness should be the goal, not efficiency."

"The risk is we're now focusing on technology: AI can do whatever you're doing, but faster. But that steals the narrative away from the more fundamental shifts in customer behaviour that marketing is great at driving."

CONCLUSION

For the organisations that can manage the balance between long- and short-term, brand and performance, the opportunity is huge.

“There’s a massive opportunity because consumers are engaging and spending a lot more than they have in the past,” Unilever’s Datta explained. “That means we as marketers can add a lot more value than we used to. When people spend more, they value the little difference that we add to our brands a lot more.

“It’s harder than it used to be, because there is more to do and fewer playbooks to follow. A lot of the growth is coming where our areas of our strength are being disrupted. Or where we don’t have the right execution capabilities, or the right solutions. But we are learning.”

Nestlé’s Allen Cai recalled reading a recent article that said how the hardest job right now is that of the CMO.

“As CMO, you’re always faced with questions,” he said. “People will ask you what you have brought to the company after investing all that money. ‘You might say it’s built the brand, but how do I measure that? And what have you achieved in the short term?’ I think that’s a good

thing; it requires you to keep improving.”

These are exactly the questions The Marketing Society was built for. The tensions this report describes, between short and long term, between efficiency and effectiveness, between organisational complexity and the need for bold strategic thinking, are not problems to be solved once and filed away. They are the permanent condition of marketing leadership. Our role is to make sure that the marketers navigating them have the community, the challenge, and the perspective they need to do so with confidence. That is what it means to mean business.



FIVE KEY TAKEAWAYS



1

Convey strategy clearly.

The best results come when the people charged with executing your strategy have a clear understanding of what that strategy is, and how success in executing it will be measured.

2

Develop full-funnel measurement.

The only way to break the either/or of performance vs brand is to understand how the two work together.

3

Let AI free you from operational challenges.

Marketing is about bold strokes, thinking differently, creating cut-through. AI is currently unable to do that. Instead, use it to free your team to pursue the irrational, the subconscious, the emotional cues that result in genuine connection with customers.

4

Build trust with your peers across the organisation.

If other people believe you are supporting them in their efforts to meet their KPIs, they will support you in meeting yours.

5

Future-proof your organisational structure.

Success in a world of constant flux will require constant agility. Model what that looks like for your business.

ABOUT THE MARKETING SOCIETY

We are the influential global community that expands perspectives on what marketers can achieve. Through powerful connections, bold inspiration and shared ambition, we empower leaders to unlock the best in themselves and each other. Because when marketers thrive, businesses grow and society benefits.

We exist for those who view marketing as more than just campaigns, it's a catalyst for commercial impact and cultural change. Our members are the Change Leaders, the bold thinkers and the visionary doers who drive measurable results and lead with purpose.

At a time when marketing has never been more essential amid rapid transformation, increasing complexity and human-centered innovation, we are here to elevate the role of marketing.

With members across England, Scotland, Singapore, Hong Kong, the UAE, and New York, we exist to challenge, connect and champion the marketers who mean business.

Find out more here: <https://www.marketingsociety.com/home>

ABOUT EKIMETRICS

Ekimetrics is a global leader in marketing and commercial effectiveness and AI-powered solutions, with offices across three continents, and a team of 500+ AI and MMM experts.

In the next ten years, business models will be deeply reshaped by AI and the need for sustainability. In that context, Ekimetrics' mission is to empower organisations through AI and data science solutions to help future-proof organisations. We specialise in optimising revenue, profit, and mission-critical operations through a unique blend of tech and service.

We're committed to delivering business impact at scale, through sustainable and ethical AI and data practices.

Find out more here: <https://www.ekimetrics.com/>

For questions about this report, please contact:

Brynie McBurney

Head of Global Hubs, The Marketing Society
brynie@marketingsociety.com



Ekimetrics.