

FACTOR

# Wave of Change

B2B CMO

10 MINUTE READ

August 2025

Quarterly Tech Decision Maker Survey Extract

142 Respondents



# CAUTIOUS OPTIMISM SHAPES MARTECH ADOPTION IN ANZ

## Insights and Strategic Directions from 142 Australian CMOs

This Wave of Change report is based on a pulse survey of almost 142 CMOs across Australia, conducted in July 2025. It identifies their challenges, strategic priorities, investment opportunities, and digital focus areas. These insights offer a glimpse into CMOs' current investments, departmental challenges, and how industry participants are navigating the complexities of the modern landscape to develop effective strategies and drive sustainable growth.

## MAJORITY OF ANZ CMOs ARE CHALLENGERS

Marketing has earned a bigger seat at the table in ANZ, but bold experimentation isn't the norm. Instead, most leaders take a measured, results-first approach. Only 18% see themselves as early adopters, while most prefer to back proven technologies that can clearly deliver ROI.

### Key Stats:

50% are Challengers, selectively adopting only proven and relevant technologies.

A significant 32% are Laggards, often constrained by budget, legacy tech, or unclear ROI.

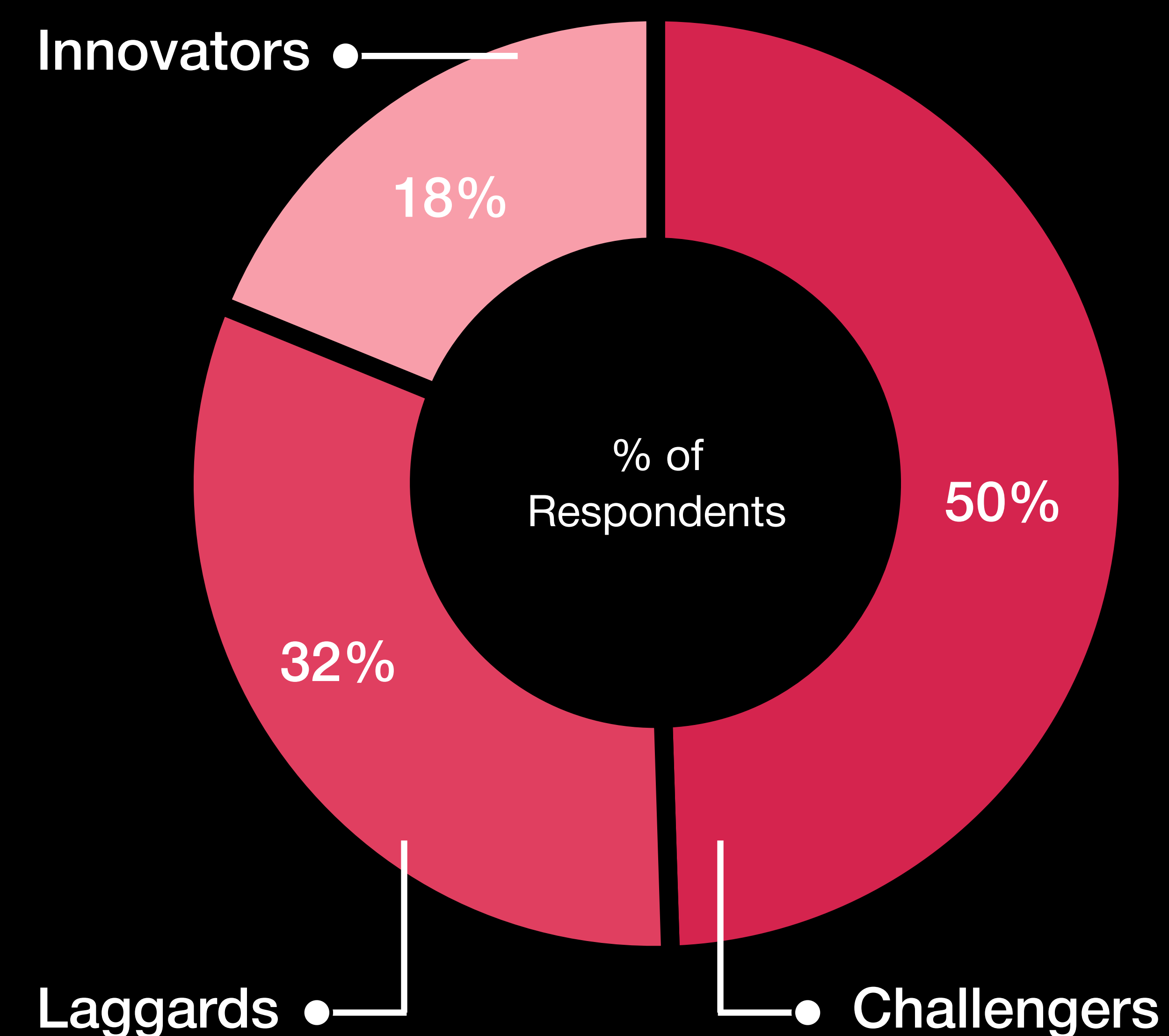
Only 18% are Innovators, indicating a small appetite for bleeding-edge tools.

Source: Factor Insights, n=175

### Factor this in:

For marketers, successful innovation requires more than just new capabilities, it needs to deliver clear, practical value that the organisation is ready to use...with a bit more risk taking.

Technology Adoption Profile





# WHO'S DRIVING MARKETING?

In ANZ, marketing leaders are doing much more than running campaigns-they're shaping critical tech-decisions with a pragmatic mindset. Around 90% hold decision-making power or influence, meaning martech and campaign budgets sit firmly within marketing, not dictated by IT, finance, or sales. Nearly half (47%) are the final decision-makers, reflecting how marketing's role in business strategy has grown, especially as leaders work to link campaigns directly to revenue and customer engagement.

## Key Stats:

47% are final decision-makers on marketing strategy and budget.

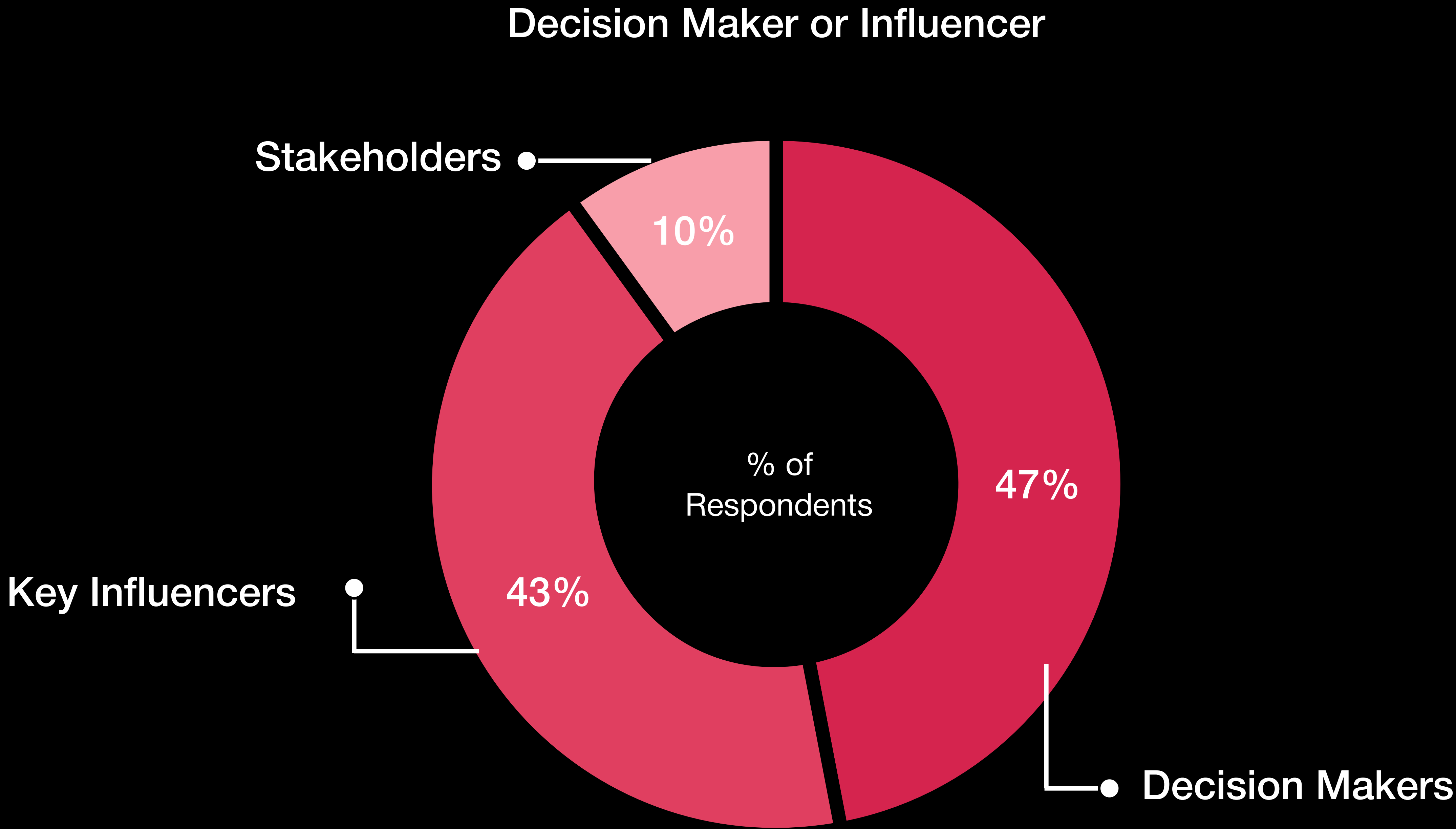
43% are key influencers in martech investment decisions.

10% are stakeholders impacted by marketing strategies.

Source: Factor Insights

## Factor this in:

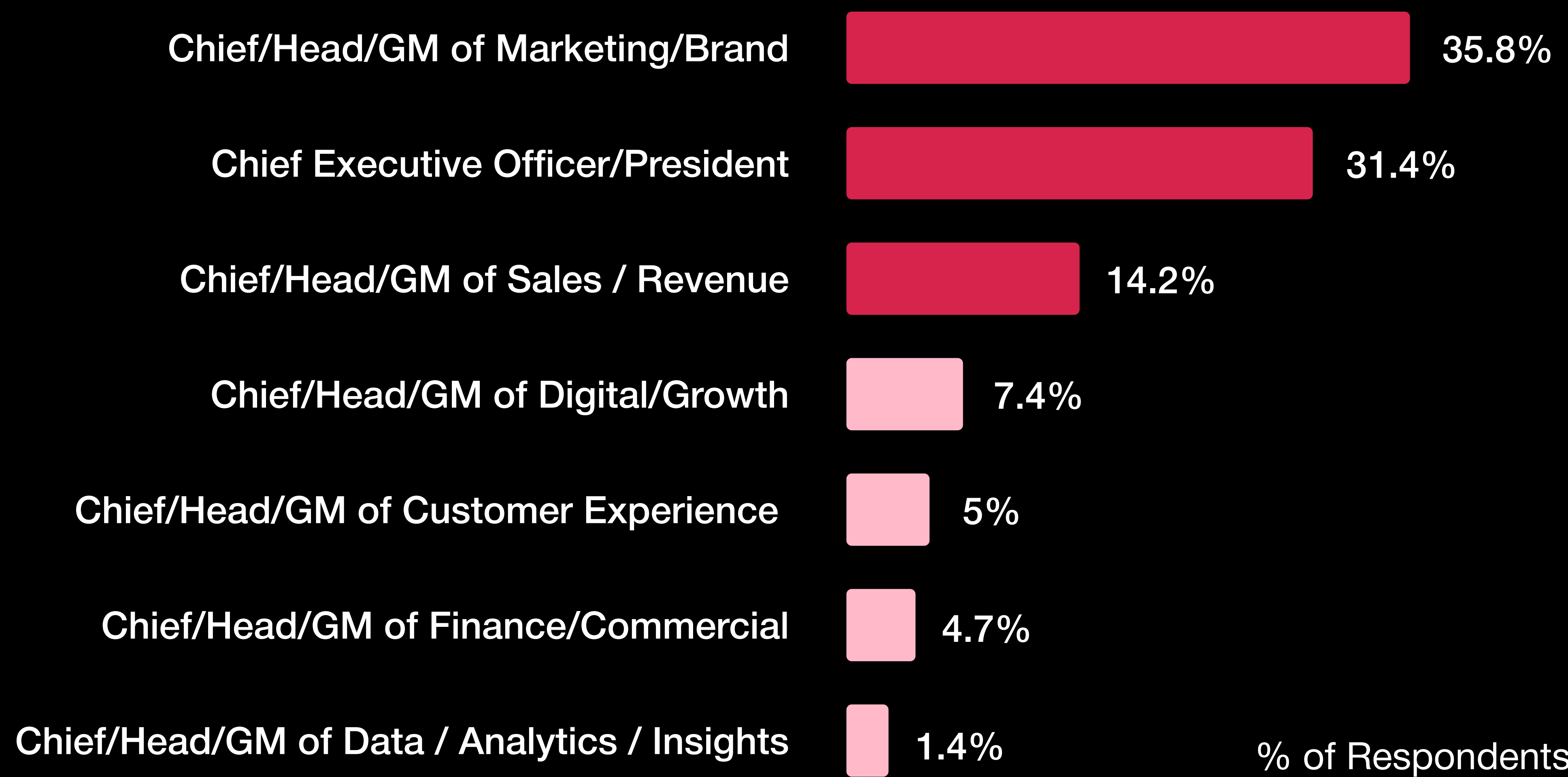
For marketers if you're proposing new martech, frame it around business outcomes and marketing-led KPIs. These other leaders hold the strategy and the budget, and your pitch needs to speak their language.



# MARKETING IS CENTRAL - BUT STILL TOO ISOLATED

Marketing leaders in ANZ have stepped up to own strategy and tech decisions, but these choices often stay within the CMO’s office and the CEO, with little input from sales, finance, or data teams.

Other Influences/Responsibility For Marketing And Customer Strategy



Key Stats:

- 67.2% of marketing strategy decisions are driven by the Head of Marketing (35.8%) or CEO (31.4%).
- Only 14.2% of influence comes from Sales/Revenue leaders, limiting alignment on shared growth outcomes.
- A mere 1.4% of decision influence comes from Data/Analytics leaders, despite the emphasis on data-driven marketing.

Source: Factor Insights

Factor this in:

To get the most out of martech investments, marketing needs to move beyond working in isolation and start collaborating more closely with the rest of the business.



# FROM FRAGMENTED TOOLS TO CONNECTED GROWTH ENGINES

Marketing leaders in ANZ are feeling the pressure to show results, not just run campaigns-and that’s shaping their tech priorities. Instead of chasing the latest shiny tools, many are working to build a connected foundation that gives them clear visibility, enables automation, and aligns better with sales.

### Key Stats:

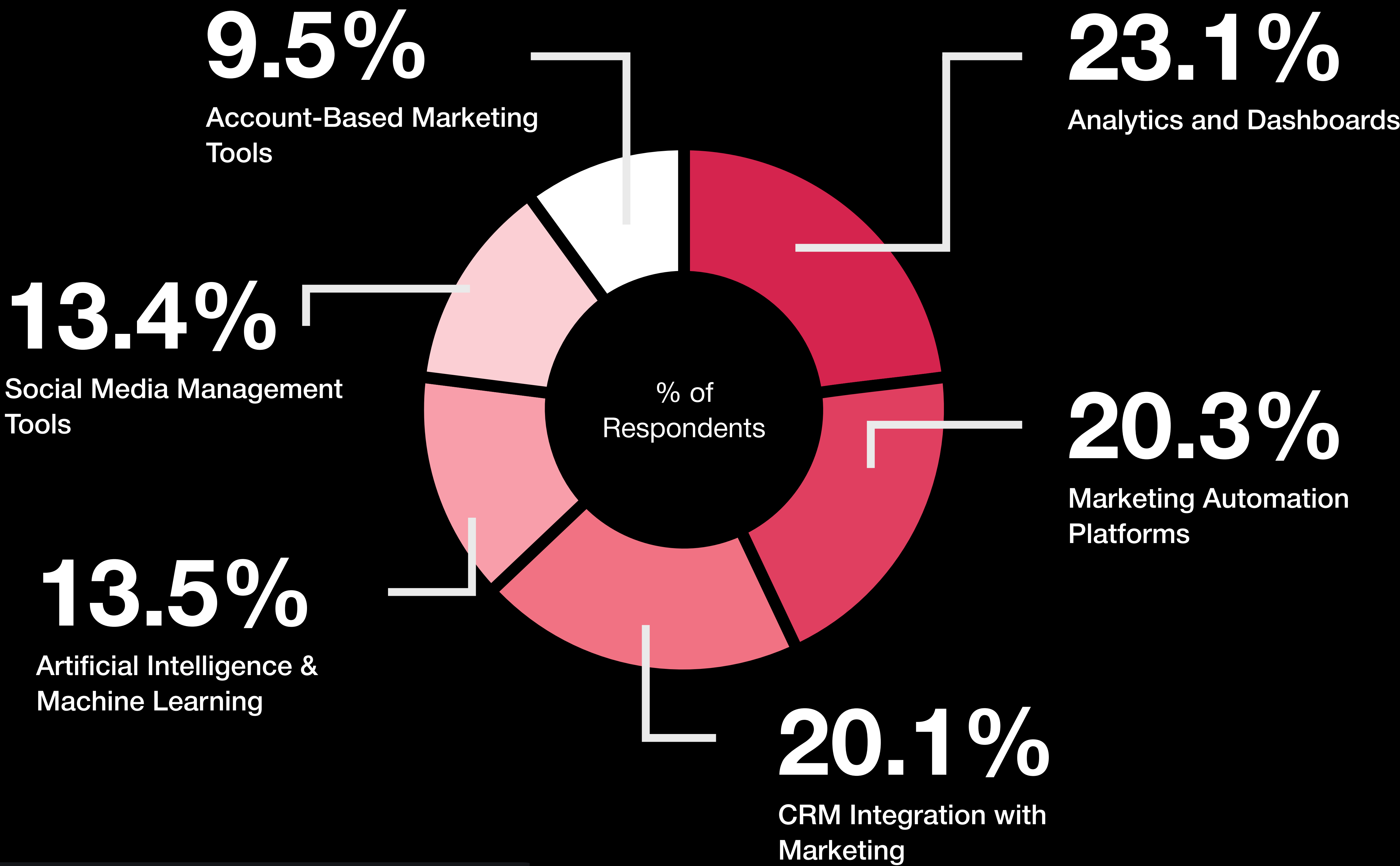
- 23% of leaders say analytics and dashboards are the top technology shaping strategy driven by the need to demonstrate ROI and performance.
- 20% rely on marketing automation platforms to streamline execution and scale personalisation but many tools are underutilised.
- 20% prioritise CRM integration to improve sales-marketing alignment though poor data quality often hinders results.
- Just 13% are actively using AI/ML, reflecting early experimentation and a need for better data foundations and skills.

Source: Factor Insights

### Factor this in:

For leaders, this means martech decisions need to go beyond flashy features. Focus on how well tools integrate, how easily teams can adopt them, and how they add value across the business.

Technologies Currently Shaping Marketing Strategy

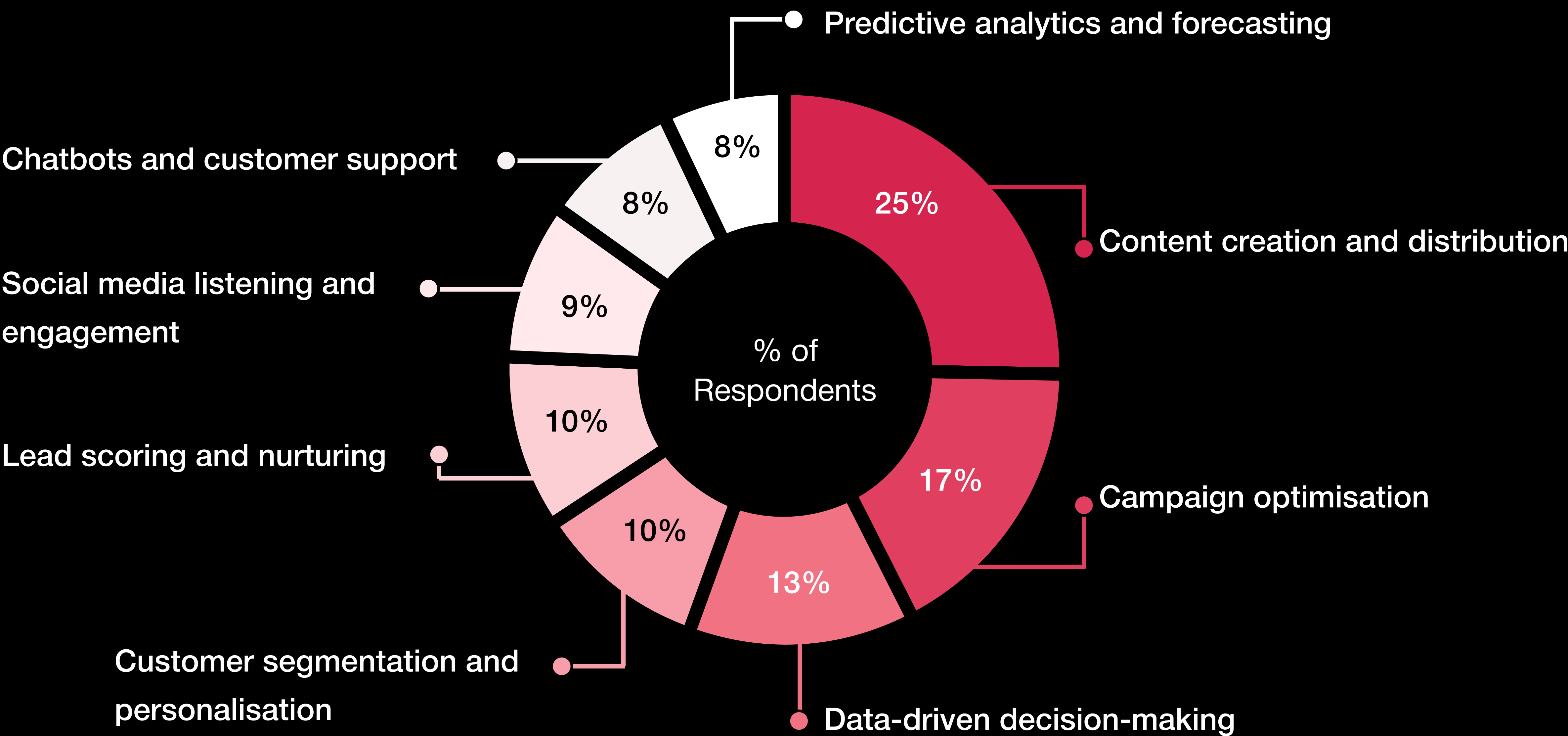




# AI IN ANZ MARKETING: STILL TACTICAL, NOT TRANSFORMATIONAL

AI is being used in ANZ marketing out of necessity, not just ambition. Marketers are turning to it to ease content bottlenecks and keep campaigns moving, helping teams do more with less, especially in content production and media optimisation. But when it comes to more advanced uses, adoption is still limited.

AI Use By Marketing



Key Stats:

- 25% use AI for content creation and distribution, the top use case in the region.
- 17% use it for campaign optimisation, especially to manage media spend and conversions.
- 13% apply AI for data-driven decision-making, though adoption is still limited by fragmented data.
- Advanced applications like predictive analytics (8%) and customer segmentation (10%) remain niche.

Source: Factor Insights

Factor this in:

For marketing leaders, the takeaway is straightforward: AI is delivering tactical wins today, but to unlock its full potential, it needs to be tied into your data, metrics, and planning, not just used as a bolt-on.



# ANZ MARKETERS ARE SQUEEZED FOR RESULTS - AND RUNNING LOW ON LEVERS

Marketing leaders in ANZ are feeling the heat to deliver real business results, all while dealing with tighter budgets, higher expectations, and a mess of disconnected tools. Growth targets are still on the table but getting there isn't easy when teams face measurement gaps, fragmented customer journeys, and misalignment with sales.



## Key Stats:

20.3% cite customer acquisition and retention as their biggest hurdle.

19.8% say measuring ROI remains a top challenge.

18.1% are held back by budget constraints.

18.1% also struggle to build brand loyalty and awareness amid saturation and distraction.

Source: Factor Insights

## Factor this in:

If marketing is to be seen and funded as a true growth driver, leaders will need to focus on unifying data, proving value, and scaling efforts in a smarter, more connected way.



# MARKETING CAN'T LEAD GROWTH WITHOUT FIXING THE FOUNDATIONS

Marketing is gaining ground as a strategic driver in ANZ, but operational roadblocks are holding it back and leaders can't afford to ignore them anymore. The biggest barriers of tight budgets (23%), challenges measuring ROI (22.3%), and outdated tech (16.2%) aren't just everyday frustrations for marketing teams. They point to deeper issues.

### Key Stats:

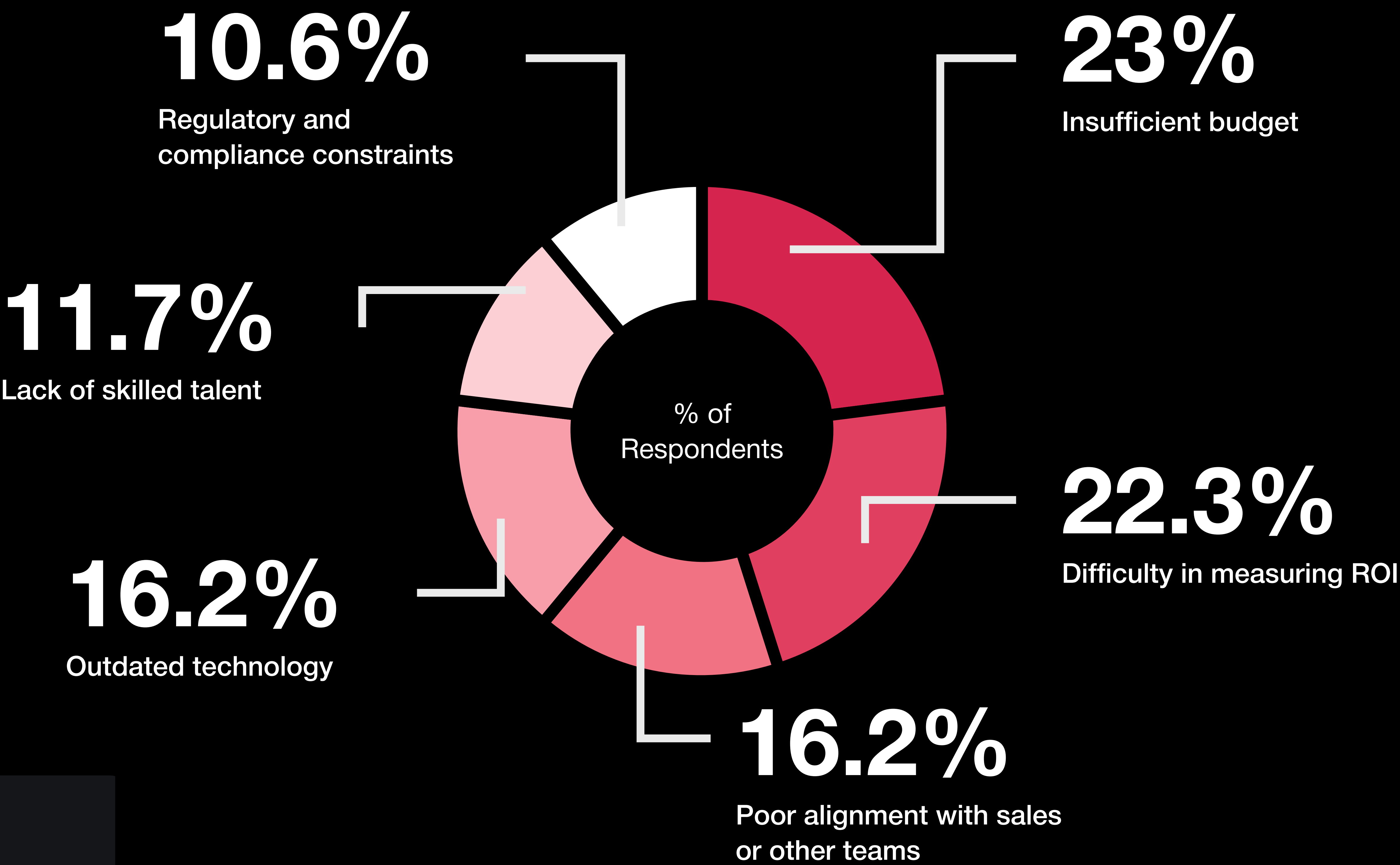
- 23% cite insufficient budget as the top barrier to effective marketing.
- 22.3% say poor ROI measurement is eroding credibility and agility.
- 16.2% highlight outdated tech as a blocker to real-time engagement.
- 16.2% also struggle with poor alignment across internal teams.

Source: Factor Insights

### Factor this in:

If businesses want marketing to lead growth, they need to start by fixing the foundations: unified technology, shared metrics, and a clear focus on performance and accountability.

Greatest Barriers To Achieving Marketing Goals





# SHORT-TERM WINS VS. LONG-TERM EDGE: MARTECH CHOICES IN ANZ

When ANZ marketing leaders choose new tech, they’re focusing on what works, not what’s shiny. Cost-effectiveness (21.6%), ease of integration (20.6%), and scalability (18.3%) are at the top of their list, showing that the priority right now is to build a stable, efficient core before chasing advanced features.



Key Stats:

- 21.6% rank cost-effectiveness as their top tech selection criterion tied directly to tight budgets and ROI scrutiny.
- 20.6% prioritise ease of integration reflecting a need to reduce data silos and manual work.
- Only 4.7% value personalisation features, despite rising customer expectations for relevance and individualisation.
- 8.6% rank advanced analytics highly revealing a lag between data ambitions and operational readiness.

Source: Factor Insights

Factor this in:

Leaders need tools that fit into their current stack and can show clear ROI, fast. But there is a risk in that. Solving today’s challenges needs to be balanced with investing in future ready tools.



# KEY TAKEAWAY, NEXT STEPS, AND WHAT IT MEANS FOR MARKETING LEADERS

CMO IMPERATIVE	KEY FINDINGS	CMO IMPACT	RECOMMENDATION
Compliance and Governance	Marketing leaders in ANZ hold real decision power, with 90% being decision-makers on martech spend.	CMOs have control but need to ensure martech investments align with growth priorities.	Anchor pitches and investments in business outcomes, not tech features.
Marketing Is Central, But Isolated	Decisions sit with the CMO/CEO, but input from sales, data, and finance is limited, risking silos.	CMOs risk slow progress on ROI and customer insights without cross-functional alignment.	Build structured collaboration with sales and data leaders to drive joined-up strategies.
Cautious Optimism in Adoption	Most marketers are cautious adopters, favouring proven ROI-aligned tech over hype.	Adoption will remain slow unless tools demonstrate clear, practical value.	Focus on small-scale pilots tied to measurable KPIs before scaling advanced tools.
From Fragmented Tools to Connected Engines	Leaders are prioritising integration, automation, and clear visibility over chasing new tools.	The market is maturing, but challenges with silos and adoption remain.	Prioritise unifying your martech stack before layering on advanced capabilities.
AI: Tactical, Not Transformational	AI is used for content and media efficiency, with limited advanced use due to data and skills gaps.	AI can ease workloads but won't transform marketing unless tied to data and strategy.	Invest in data foundations and clear AI use cases linked to business goals.
Squeezed for Results, Low on Levers	Budget constraints, ROI pressures, and fragmented journeys limit growth impact.	CMOs are under pressure to prove value but lack the tools and alignment to scale outcomes.	Prioritise initiatives that connect marketing efforts to measurable business results.
Marketing Can't Lead Without Foundations	Tight budgets, ROI challenges, and outdated tech are structural barriers.	These are not surface issues; they are blocking marketing's ability to lead growth.	Fix foundational issues—tech integration, data alignment, shared metrics—first.
Short-Term Wins vs Long-Term Edge	Cost-effectiveness, ease of integration, and scalability top tech buying priorities.	Pragmatic choices solve today's issues but risk missing future competitiveness.	Balance practical tech investments with selective bets on future-ready capabilities.
Focus on Execution, Not Hype	Martech budgets are going towards execution-focused tools that fix core problems.	The shift is towards practical, efficient tools to enable smarter, faster marketing.	Continue investing in execution tools while building readiness for advanced strategies.



# THE CMO ROADMAP: WINNING THE GROWTH GAME





# Thank you

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