



# Re-architecting marketing for growth:

Insights from ANZ CMOs on the 2026 Agenda



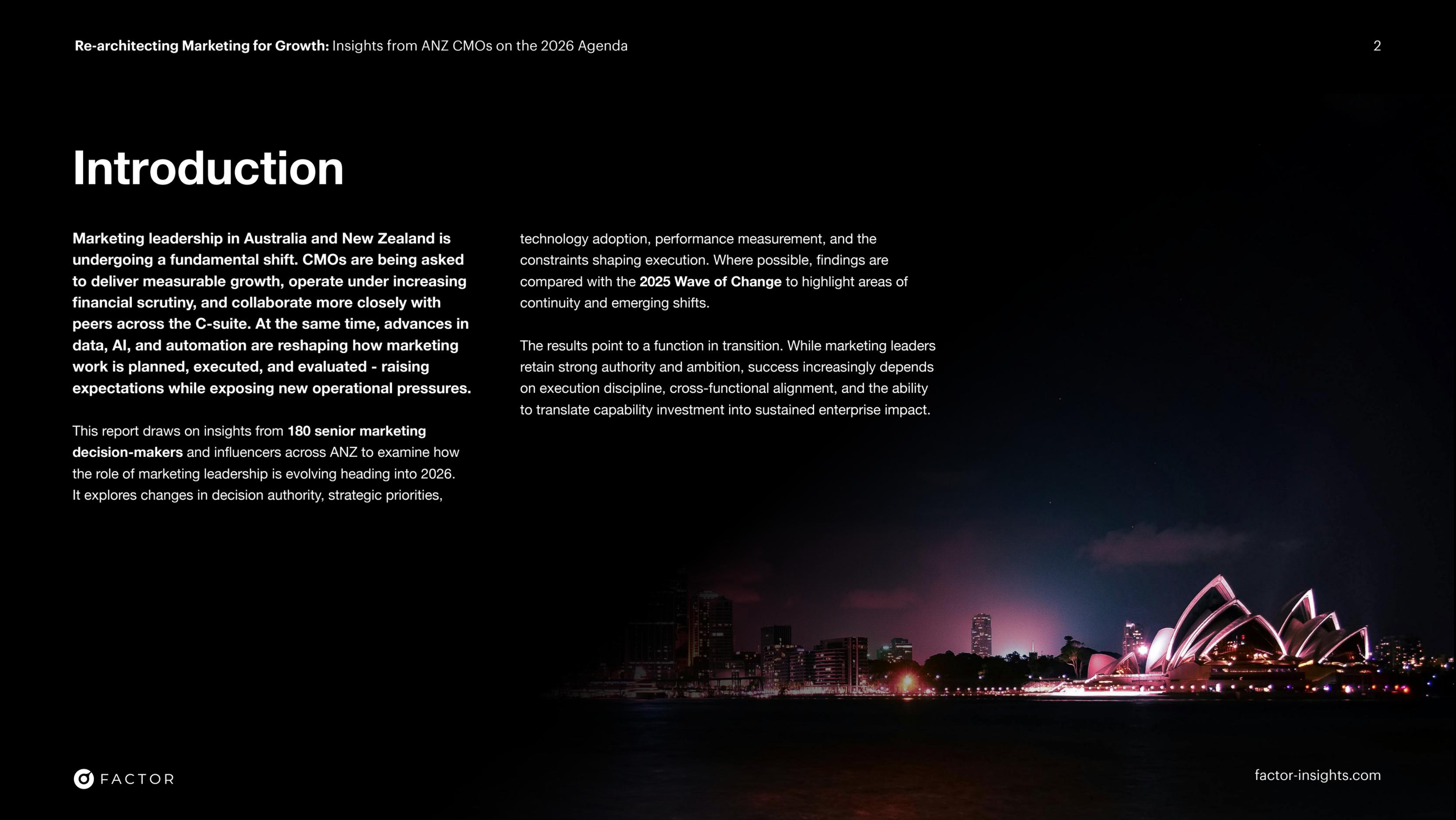
# Introduction

**Marketing leadership in Australia and New Zealand is undergoing a fundamental shift. CMOs are being asked to deliver measurable growth, operate under increasing financial scrutiny, and collaborate more closely with peers across the C-suite. At the same time, advances in data, AI, and automation are reshaping how marketing work is planned, executed, and evaluated - raising expectations while exposing new operational pressures.**

This report draws on insights from **180 senior marketing decision-makers** and influencers across ANZ to examine how the role of marketing leadership is evolving heading into 2026. It explores changes in decision authority, strategic priorities,

technology adoption, performance measurement, and the constraints shaping execution. Where possible, findings are compared with the **2025 Wave of Change** to highlight areas of continuity and emerging shifts.

The results point to a function in transition. While marketing leaders retain strong authority and ambition, success increasingly depends on execution discipline, cross-functional alignment, and the ability to translate capability investment into sustained enterprise impact.



# Executive summary

## Marketing has moved into the centre of enterprise decision-making

Marketing is no longer operating on the periphery of growth decisions in ANZ organisations. 84% of respondents are either final decision-makers (41.1%) or key influencers (42.8%) in marketing strategy and budget decisions, confirming that marketing leadership holds meaningful authority and accountability at the enterprise level.

## Decision-making is increasingly shared across the C-suite

While marketing leaders retain ownership, decision influence is broadening. 34% of respondents cite the CEO as a key co-decision-maker, alongside Sales (23%) and Finance (18%). Notably, Data & Analytics leaders now appear as a visible contributor (9%) to marketing strategy and spend decisions - a shift not clearly observed in the 2025 Wave of Change.

## The 2026 agenda remains firmly capability-led

Marketing priorities for 2026 continue to centre on foundational capabilities rather than channels. Data & Insights (79.6%), Digital Transformation (78.6%), and Customer Experience (77.6%) are rated as high priorities (4-5), reinforcing that marketing transformation is now a multi-year, system-level agenda rather than a short-term response.

## Data, AI, and automation are moving from intent into execution

Marketing leaders are progressing from strategy into operational deployment. Analytics and dashboards (33%), CRM-marketing integration (32%), AI/ML (30%), and marketing automation platforms (29%) are shaping marketing strategy, while 32% already use AI for content creation and 31% for campaign optimisation, signalling growing execution maturity.



## ROI accountability and budget pressure continue to constrain impact

Despite increased investment, execution remains under pressure. Insufficient budget (33%) and difficulty measuring ROI (30%) are the most frequently cited barriers to achieving marketing goals, while measuring ROI of campaigns (32%) is the leading operational challenge. These pressures indicate that accountability has intensified faster than operating models have evolved.

## Success metrics are reinforcing short-term performance behaviour

Marketing success is predominantly defined by commercial outcomes. 42% of respondents cite ROI on marketing campaigns as a primary KPI, compared with 33% tracking brand awareness and only 21% tracking customer lifetime value. While this has strengthened financial discipline, it has also increased short-term bias in decision-making.

## CMOs are responding by redefining their role

The combined pressure of accountability, cross-functional scrutiny, and execution complexity is prompting a shift in how CMOs view their role. Rather than focusing solely on execution efficiency, marketing leaders are increasingly positioning themselves as integrators - responsible for aligning data, technology, customer insight, and teams around enterprise growth outcomes.

## The next phase of advantage lies in operating-model change

While technology adoption remains strong - with 71% of organisations identifying as Innovators (30%) or Challengers (41%) - sustainable progress will depend on changes to skills, decision rights, and measurement frameworks. The CMOs who succeed in 2026 will be those who translate capability investment into disciplined, integrated operating models that stand up to ongoing scrutiny.

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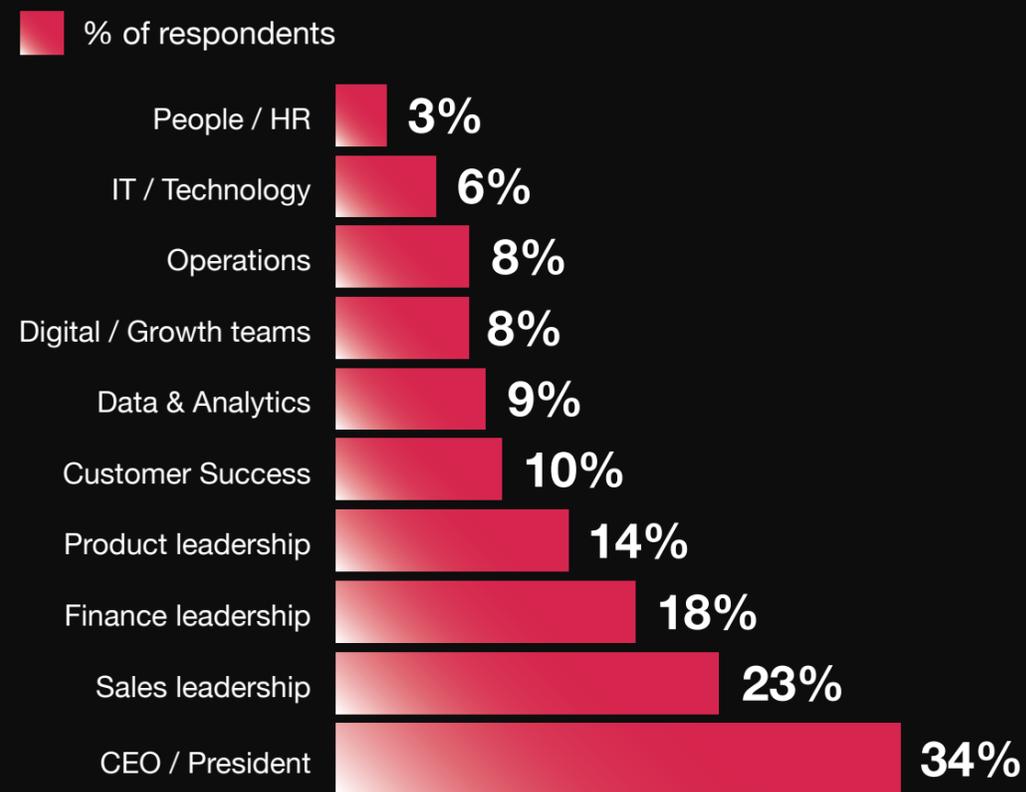
# Who else is driving marketing strategy - continuity with subtle shift

In 2025, marketing strategy decisions in ANZ were largely concentrated within the CMO and CEO, with minimal influence from Sales, Finance, or Data teams. This isolation was identified as a major constraint on ROI, alignment, and growth impact.

The 2026 data shows early movement away from this model. While CEOs, Sales, and Finance leaders continue to be the most influential partners, Data & Analytics leaders now appear as a regular contributor to marketing strategy and budget discussions, a shift not clearly observed in the 2025 findings.

2025 data & analytics influence: 1.35%

**Key influencers responsible for marketing strategy or budget decisions (2026)**  
**Function influencing marketing strategy / spend**



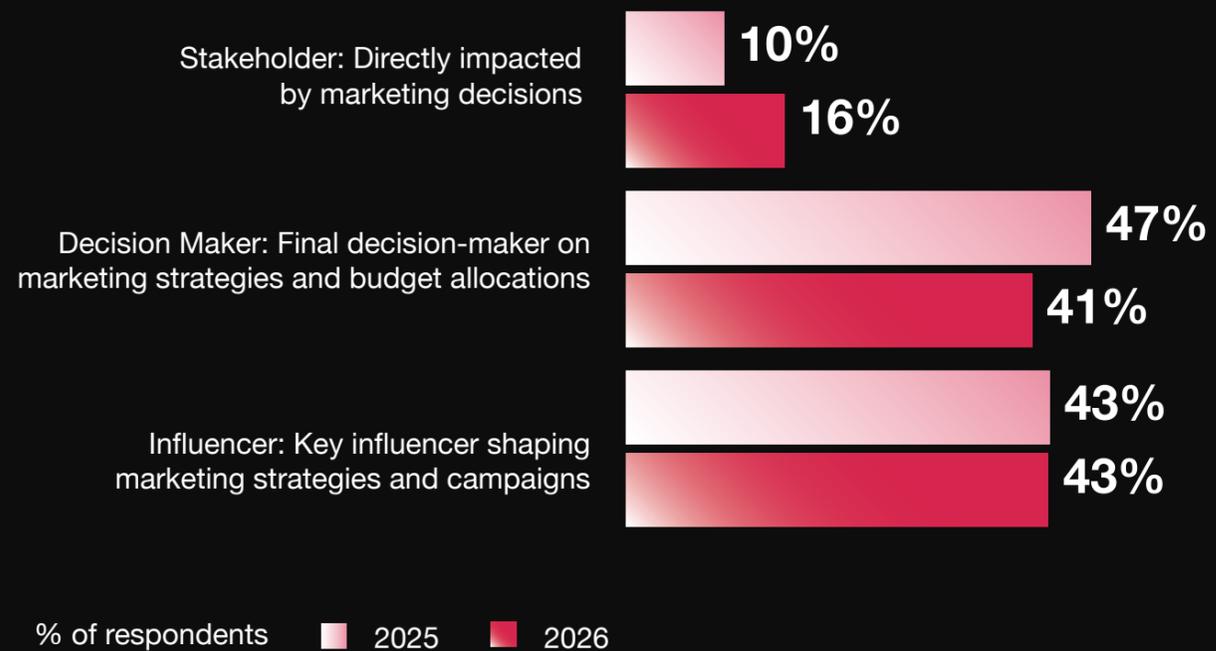
Source: Factor, n=180

# Marketing is central but no longer isolated

Marketing leaders continue to hold the primary responsibility for marketing strategy and investment decisions in ANZ. As in the 2025 Wave of Change, the majority of respondents in 2026 identify as either final decision-makers or key influencers, confirming that accountability remains anchored within senior marketing leadership.

However, compared with 2025, decision-making in 2026 is more visibly shared across the C-suite. While the CEO remains a central co-decision-maker, there are early signs of broader engagement from Sales, Finance, and Data & Analytics leaders, indicating a gradual shift from marketing-led ownership to enterprise-level governance.

Role in marketing decision making (Decision maker / Influencer / Stakeholder)  
Who's Driving Marketing Strategy



Source: Factor, n=180 (2026), n=175 (2025)

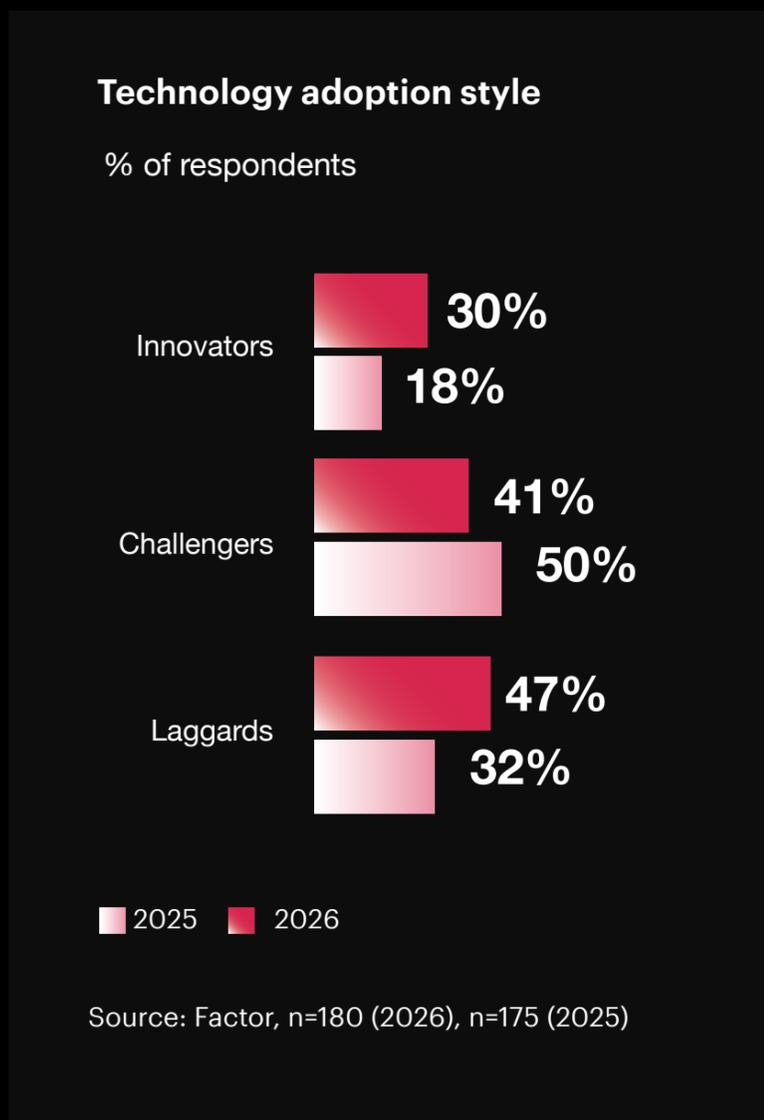
## Why it matters and implication for CMOs

Marketing leadership has both the authority and the mandate to drive capability-led transformation. With 2026 priorities anchored in data, digital transformation, and customer experience, CMOs are being judged less on campaign execution and more on their ability to build scalable growth foundations. This elevates the role of marketing leadership, but also raises expectations around execution discipline, cross-functional coordination, and measurable impact.

# Cautious optimism still defines tech adoption

The overall posture toward marketing technology adoption in ANZ remains consistent with the 2025 Wave of Change. Then, marketing leaders described themselves as pragmatic adopters, favouring proven technologies over experimentation.

The 2026 data reinforces this stance. While a meaningful cohort continues to identify as early adopters, the dominant profile is now the 'Challenger', organisations that selectively adopt new technologies only where there is a clear business case, integration path, and ROI justification.



## The 2026 agenda is capability-led, not channel-led

Data, digital transformation, and customer experience continue to dominate the agenda, reinforcing a sustained shift toward capability-led growth rather than channel optimisation.

#1 Data & Insights: 79.6% rating 4 and 5

#2 Digital Transformation: 78.6% rating 4 and 5

#2 Customer Experience: 77.6% rating 4 and 5

## Why it matters and implication for CMOs

Marketing leadership has decision authority and is being pulled into shared C-suite ownership with 2026 priorities anchored in data, digital transformation, and customer experience. The winners will be teams that can prove ROI, operationalise AI + martech, and execute cross-functionally with CEO/Sales/Finance alignment.

# Technologies shaping marketing strategies 2026

## Data-driven marketing and digital transformation are being operationalised through AI, automation, and integration

ANZ CMOs are moving beyond strategy statements into execution mode, investing in technologies and use cases that embed data and AI directly into campaign delivery, customer engagement, and day-to-day decision-making.

## What the data shows

**Execution investment is concentrated in core marketing systems, not experimental edge tools:**

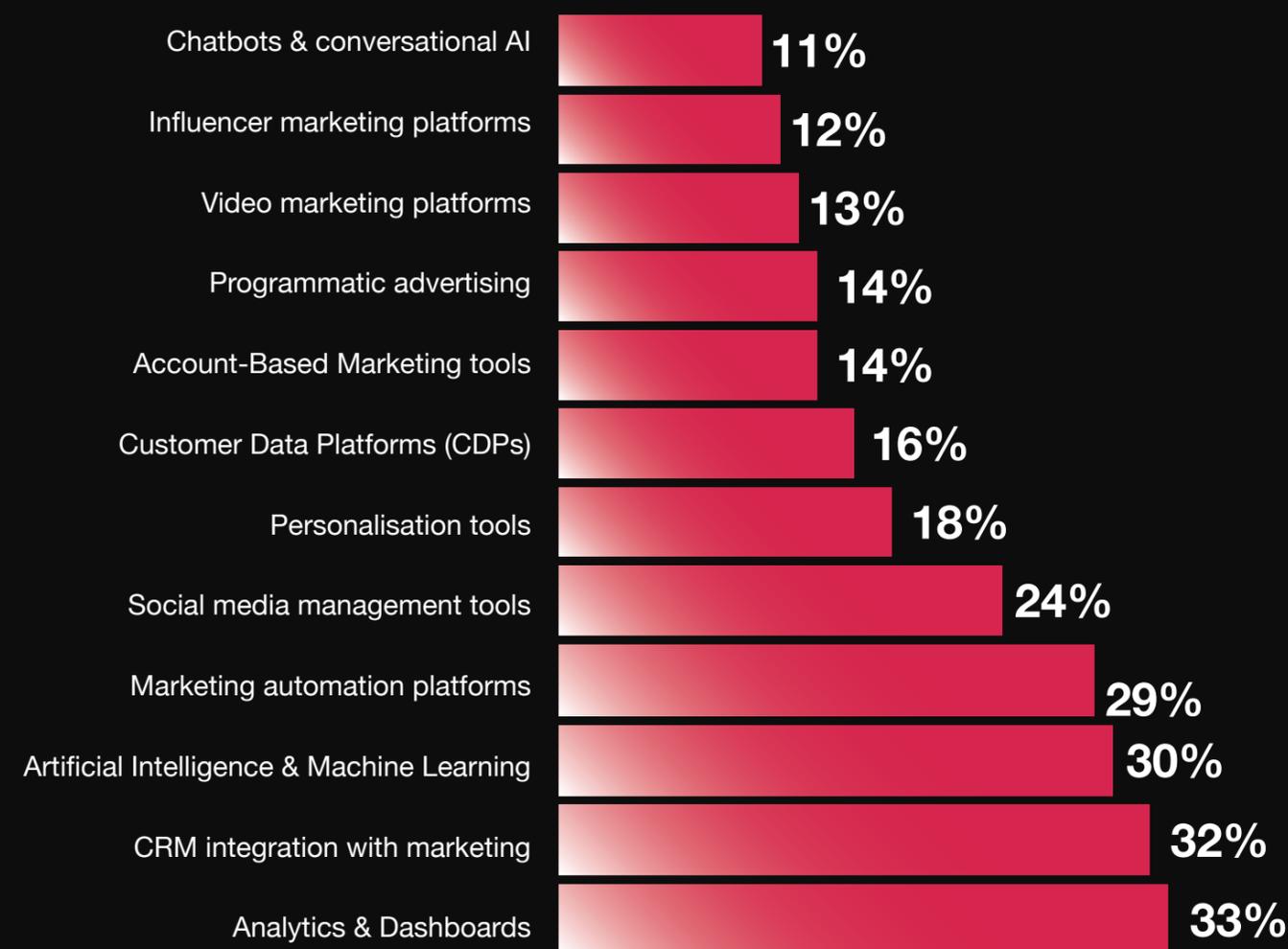
- Analytics & dashboards, CRM–marketing integration, AI/ML, and marketing automation platforms are the most frequently cited technologies shaping strategy (Q11).
- Tool choices across Digital Marketing, Data & Insights, and Customer Engagement consistently point to automation, predictive analytics, and omnichannel orchestration (Q16–Q24).

**Integration is the hidden priority:**

- High selection of CRM integration, CDPs, and analytics platforms suggests CMOs are trying to resolve fragmented data and disconnected martech stacks, rather than simply adding new tools.

## Technologies shaping marketing strategy today

■ % of respondents

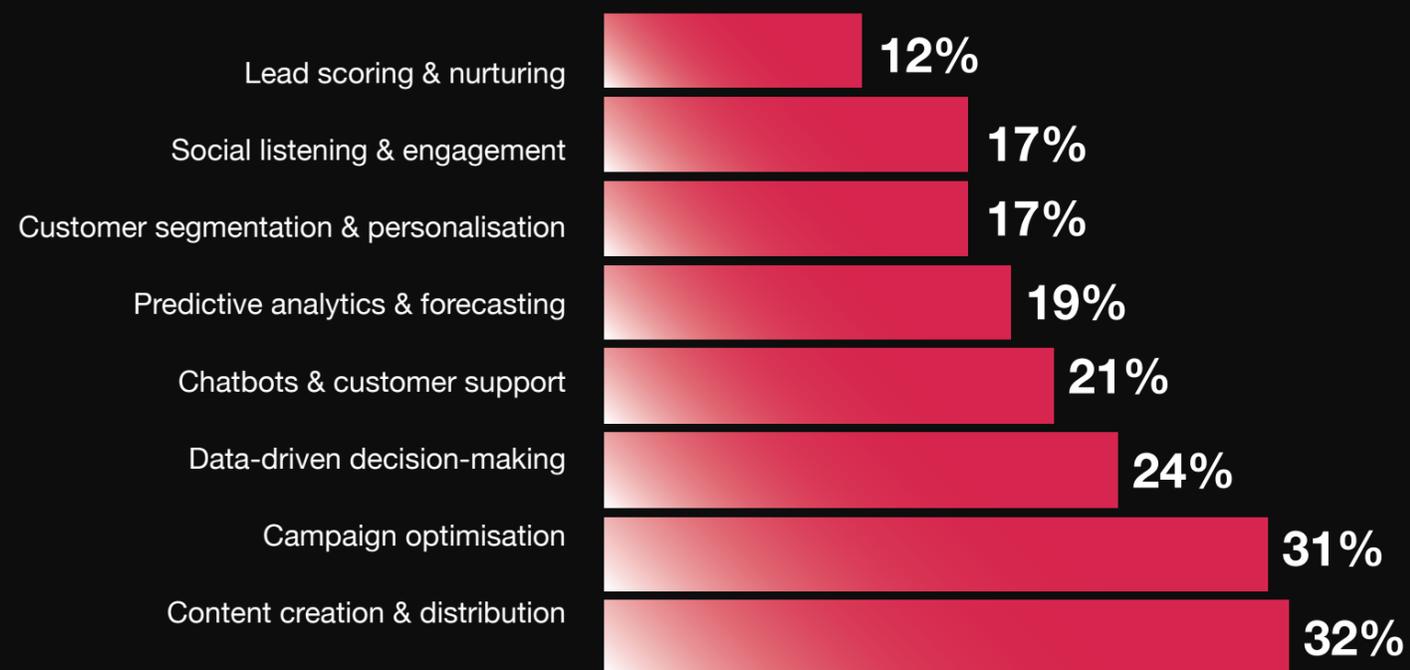


Source: Factor, n=180

# Data, AI and Automation leading the martech investment

## AI / automation use case

 % of respondents



Source: Factor, n=180

## AI is being applied to revenue-adjacent use cases, not just efficiency gains:

- The most common AI/automation applications are content creation & distribution, campaign optimisation, and data-driven decision-making (Q12).
- Secondary use cases including predictive analytics, segmentation, chatbots, and social listening, indicate a shift toward always-on, adaptive marketing models.

## Why it matters and implication for CMOs

The challenge for ANZ CMOs is no longer whether to invest in data, AI, and automation, but how effectively these capabilities are operationalised into repeatable marketing motions. Competitive advantage in 2026 will increasingly depend on execution maturity - the ability to integrate systems, embed AI into workflows, and translate technology investment into consistent performance improvements.

# Pressure points persist, despite progress

the pressures facing marketing teams have changed little since 2025. Then, leaders cited budget constraints, ROI measurement challenges, and fragmented systems as the primary barriers to impact.

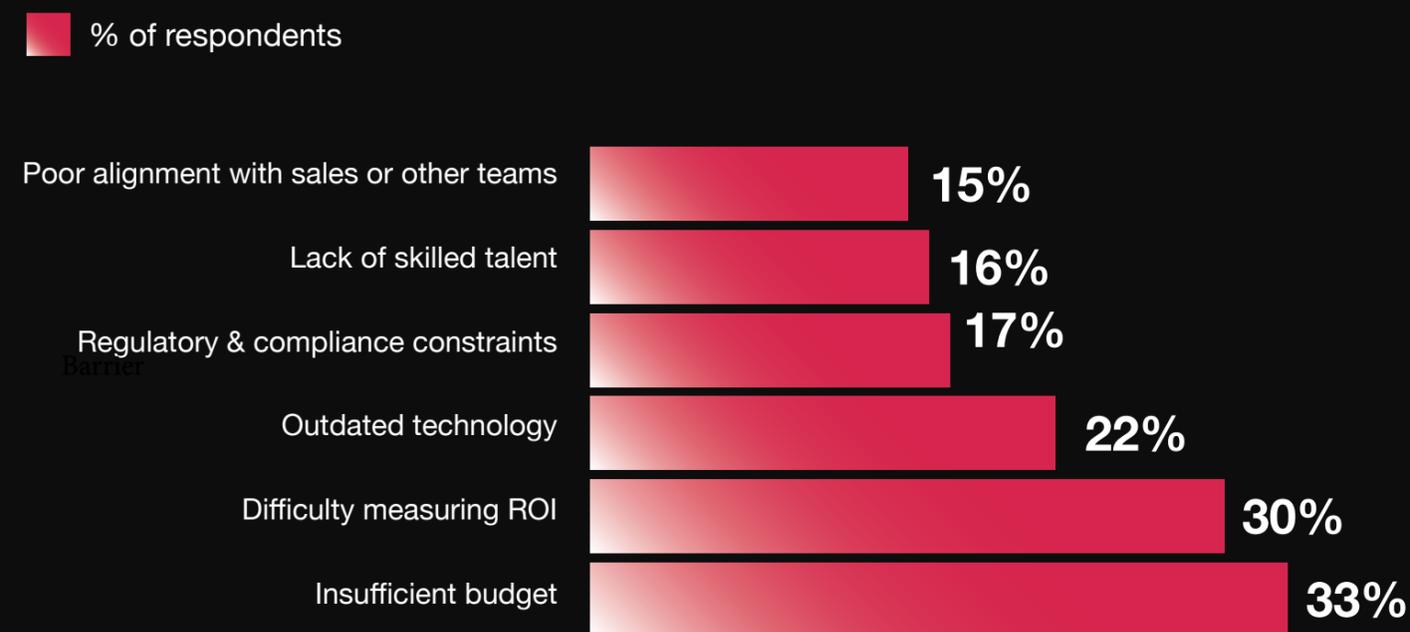
The 2026 findings show these issues persist, despite increased investment in data, automation, and AI. ROI measurement and budget constraints remain the most frequently cited challenges, suggesting that accountability pressure has intensified faster than operating models have evolved.

## What the data shows

**Budget and ROI form a reinforcing constraint loop:**

- Insufficient budget and difficulty measuring ROI are the two most cited barriers to achieving marketing goals.
- In parallel, measuring ROI of campaigns is the single most frequently cited operational challenge, indicating that funding pressure and accountability are tightly linked.
- In 2025, ROI measurement (22%) and budget (23%) were top 2 challenges

## Top barriers preventing marketing teams from achieving goals



Source: Factor, n=180

# Capability Gap Indicators 2026

Budget and ROI measurement form the primary execution bottleneck, outweighing technology and talent constraints.

Technology ambition is outpacing organisational readiness:

- Outdated technology and lack of skilled talent remain major barriers, even as organisations invest in AI, automation, and analytics.
- This points to a growing execution gap between tools owned and capabilities embedded.
- **Cross-functional misalignment continues to slow delivery:** Poor alignment with sales or other teams appears consistently as both a challenge and a barrier, reinforcing that marketing performance is increasingly dependent on enterprise-wide coordination, not just marketing excellence.

## Capability gap indicators

■ % of respondents



Source: Factor, n=180

## Why it matters and implication for CMOs

The primary constraint facing ANZ CMOs is no longer strategic intent or access to technology, but the ability to prove impact and sustain investment. Persistent pressure around ROI measurement, funding, and skills is slowing execution and amplifying risk. To progress, marketing leaders must strengthen measurement models, address capability gaps, and improve cross-functional alignment - or risk stalled transformation despite rising expectations.

# Marketing success is defined by ROI and pipeline, reinforcing short-term performance pressure

What's driving behaviour: ANZ marketing leaders are operating under intense accountability for financial impact, with success overwhelmingly measured through ROI, pipeline contribution, and near-term performance metrics rather than long-term capability or brand health.

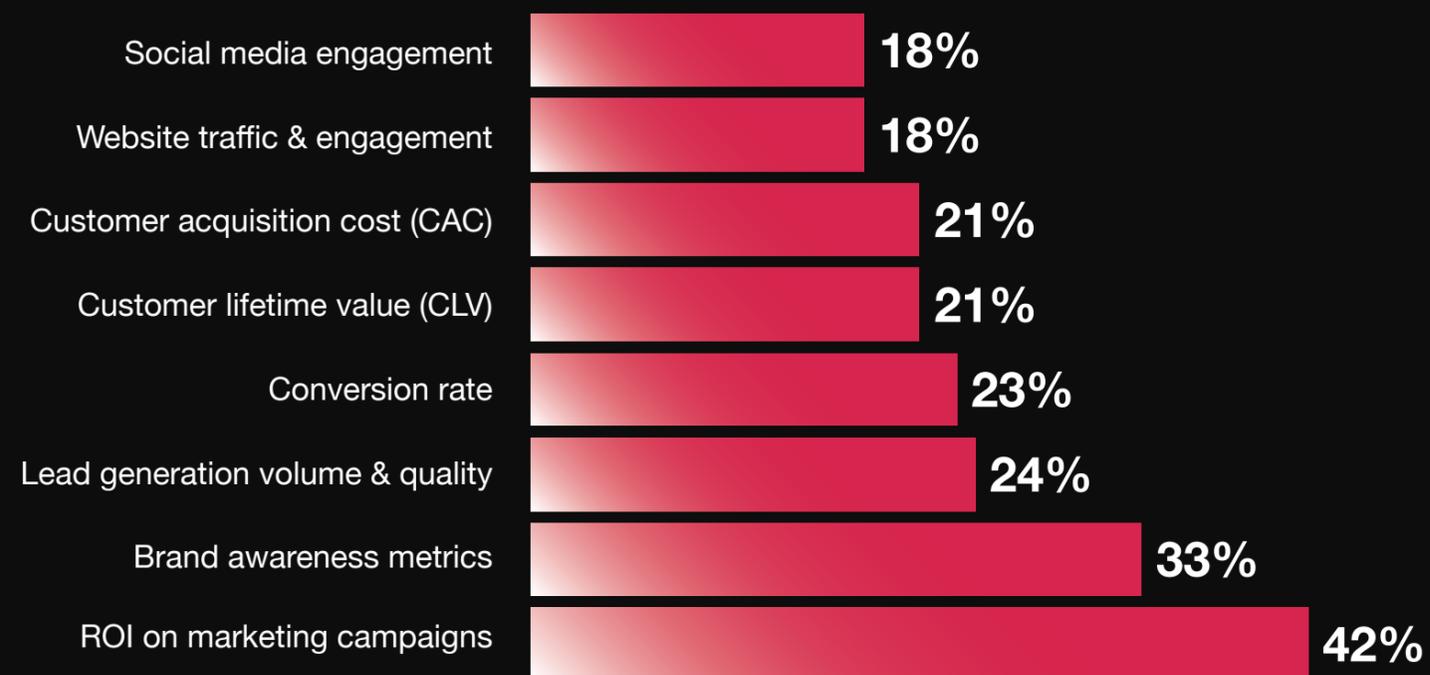
## What the data shows

### ROI dominates the success agenda:

- ROI on marketing campaigns is the most frequently selected KPI, ahead of brand awareness, lead volume, and conversion metrics (Q10).
- This reinforces why ROI measurement appears simultaneously as a top challenge and top barrier in earlier sections.

## KPI used to measure success

■ % of respondents



Source: Factor, n=180

# Commercial vs Capability 2026

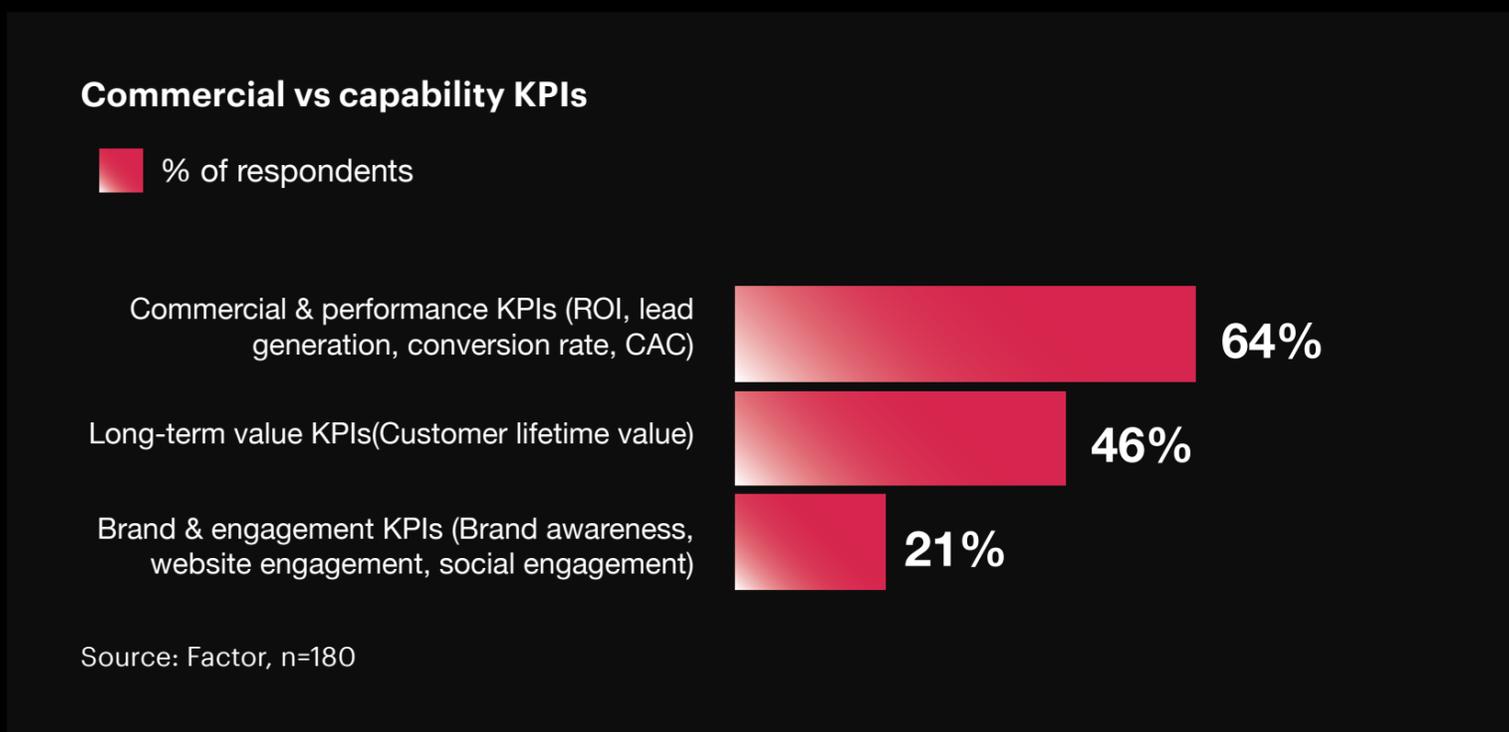
ROI is the single most dominant success metric, outweighing both brand and customer-centric measures.

## Performance metrics outweigh long-term indicators:

- Lead generation, conversion rates, and acquisition metrics are prioritised more frequently than customer lifetime value or retention-led measures.
- Brand metrics remain important but are secondary to commercial proof points.

## KPIs mirror cross-functional expectations:

- With CEOs, Sales, and Finance deeply involved in marketing decisions, KPI selection reflects enterprise-wide pressure for revenue attribution and efficiency, not just marketing effectiveness.



## Why it matters and implication for CMOs

The way success is measured is actively shaping marketing behaviour. When ROI and pipeline dominate the scorecard, teams naturally prioritise shorter-cycle initiatives, faster feedback loops, and technology that promises measurable impact. While this improves financial discipline, it also risks under-investing in long-term value creation. CMOs must evolve KPI frameworks to balance near-term accountability with sustainable growth outcomes.

The combined effect of heightened ROI accountability, persistent budget pressure, and expanding cross-functional scrutiny is creating a structural tension for marketing leaders. On one hand, CMOs are required to deliver immediate, measurable performance. On the other, they are expected to build the data, technology, and operating foundations needed for long-term growth. This tension is increasingly shaping how marketing leaders think about their role, prompting a gradual move beyond execution efficiency toward a broader mandate centred on orchestration, integration, and enterprise impact.

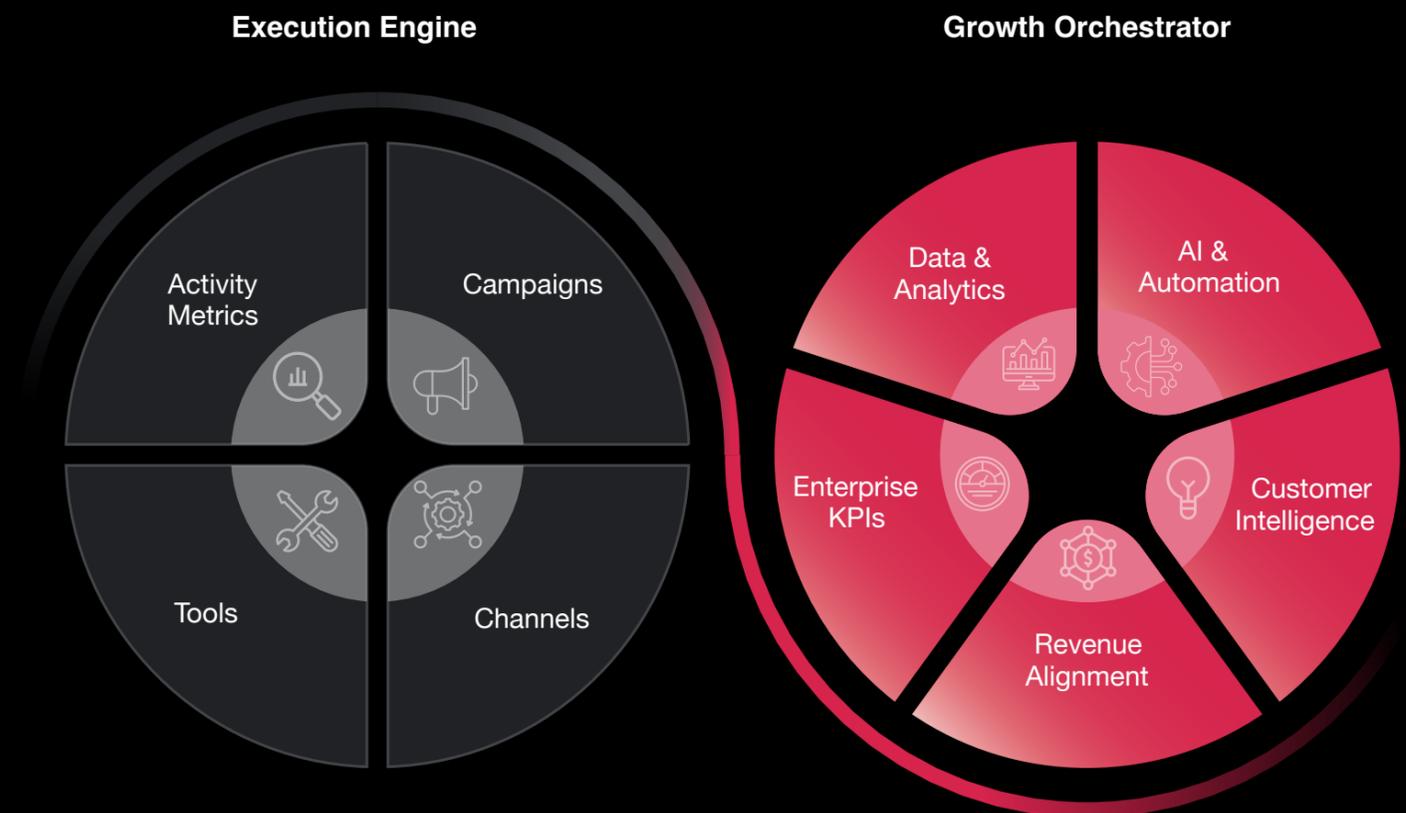
# CMOs are attempting a quiet shift from execution excellence to enterprise growth orchestration

What's really changing: ANZ marketing leaders are no longer optimising marketing as a standalone function. They are repositioning it as a growth orchestration layer, one that connects data, technology, customer insight, and cross-functional decision-making to influence enterprise outcomes.

## What signals this shift

- **Marketing decisions are increasingly shared across the C-suite**, particularly with CEOs, Sales, and Finance, signalling that marketing is expected to contribute directly to growth, efficiency, and accountability.
- **The strongest strategic focus is on system-level enablers**, data, digital transformation, and customer experience, rather than channels or campaigns.
- **AI and automation are being embedded into core workflows**, such as campaign optimisation, decision-making, and personalisation, rather than treated as isolated innovation initiatives.

## Marketing's Role is Expanding



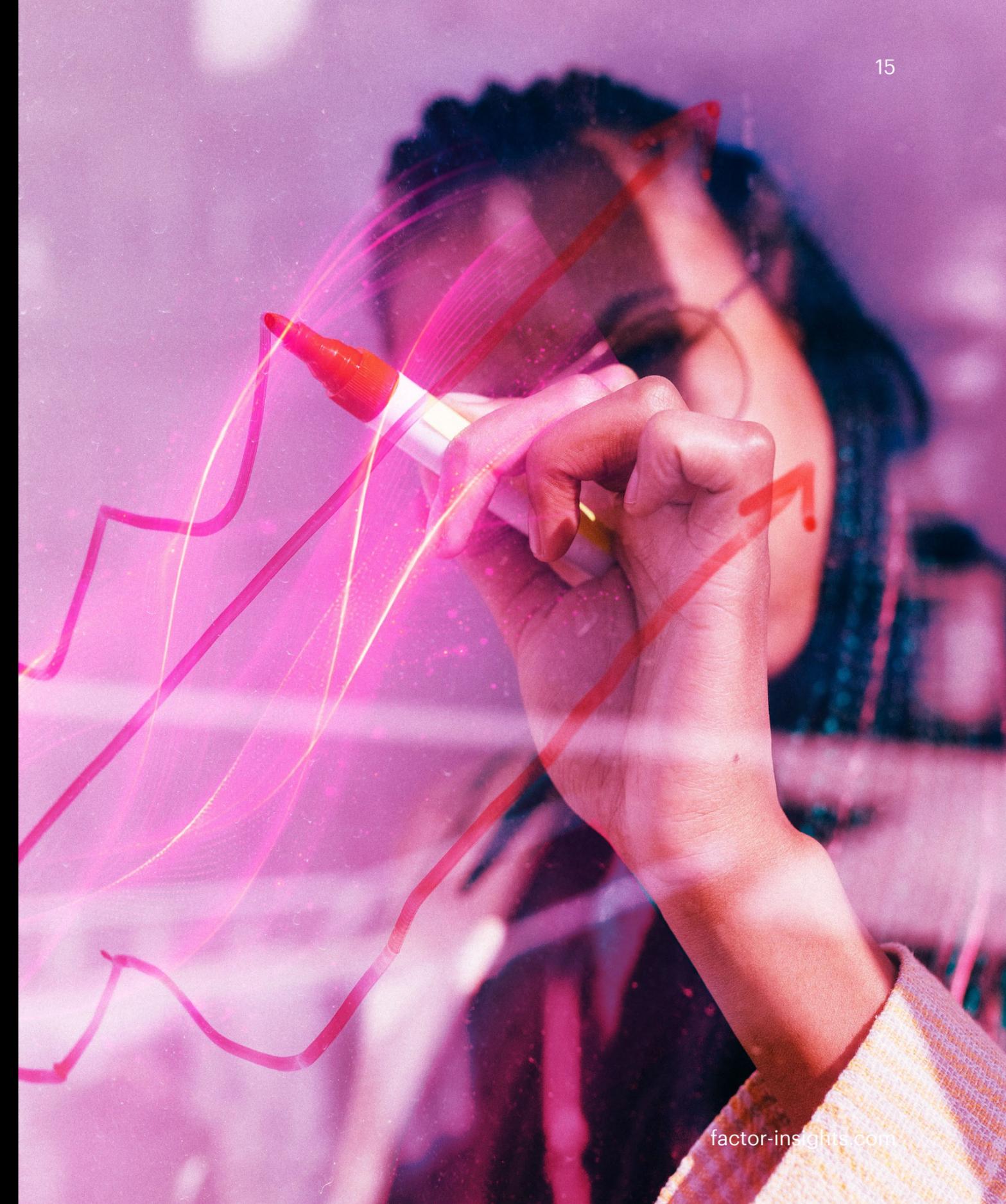
## What CMOs are trying to become

Rather than 'running more marketing', leaders are trying to:

- shorten decision cycles through better data and automation
- create a single view of the customer that Sales, Product, and Finance can trust
- move from activity-based reporting to growth accountability

### Why this matters and implication for CMOs

While this shift toward growth orchestration is underway, it remains partially unspoken. Capability gaps around skills, operating models, and integration are often framed as tactical issues rather than the organisational transformation they represent. The next phase of advantage will not come from new tools or frameworks, but from positioning marketing as connective tissue across growth, customer, and revenue teams - with clear decision rights, shared metrics, and accountability.



## What this means for ANZ CMOs in 2026: three strategic moves to make now

ANZ marketing leaders are entering 2026 with greater authority, higher expectations, and tighter scrutiny than ever before. The findings in this report point to three strategic moves that will separate marketing organisations that scale from those that stall.

### 01 Shift from campaign performance to growth-system ownership

CMOs are increasingly accountable for enterprise outcomes, not just marketing outputs. With CEOs, Sales, and Finance directly involved in marketing decisions, success depends on owning how growth is generated, not just where marketing is executed

#### What this means in practice

- Fewer, larger strategic bets tied to growth outcomes
- Clear articulation of how data, AI, and customer insight translate into revenue
- Marketing positioned as a growth engine, not a service function

### 02 Redesign measurement to balance accountability with long-term value

ROI pressure is shaping behaviour across the marketing organisation. While this has improved discipline, it also risks biasing teams toward short-term optimisation at the expense of durable growth.

#### What this means in practice

- Retaining ROI and pipeline as core metrics, but complementing them with indicators of long-term value (customer lifetime value, retention, engagement quality)
- Aligning KPIs with Sales and Finance to reduce friction and rebuild trust
- Using data and automation to shorten feedback loops, not just justify spend

### 03 Treat operating-model change as the real transformation agenda

Technology adoption is no longer the hard part. The real constraint lies in skills, integration, and decision rights. Until these are addressed explicitly, transformation efforts will remain slower and more fragmented than ambition requires.

#### What this means in practice

- Investing in capability uplift alongside technology
- Clarifying decision ownership across marketing, sales, product, and data teams
- Moving from tool-led transformation to operating-model-led change

Conclusion:

# From marketing function to growth engine

ANZ marketing leaders are entering 2026 with greater authority, higher expectations, and sharper accountability than ever before. As marketing becomes more central to enterprise growth, the pressure to prove ROI, operationalise data and AI, and align tightly with Sales and Finance is intensifying. While CMOs are making progress in building data-driven and digitally enabled capabilities, structural constraints around measurement, skills, and operating models continue to limit impact. The next phase of advantage will come not from adding more tools or activity, but from redesigning how marketing decisions are made, measured, and executed across the organisation. Those who succeed will position marketing as a disciplined, integrated growth engine, accountable to the outcomes the business values most.

**Focus Area**

**Narrative Messaging for Canva**

**Execution speed and consistency now define marketing impact**

Only **18% of ANZ CMOs identify as innovators**, while **50% are challengers** who selectively adopt proven tools. At the same time, **90% of CMOs make or influence martech decisions**, with accountability sitting firmly inside marketing.

Position **Canva's Visual Suite** (Docs, Presentations, Social, Video, Whiteboards) as a proven execution platform that enables marketing teams to move faster while maintaining consistency, allowing CMOs to deliver visible impact without introducing risk, complexity, or specialist dependency.

**Fragmented tools and tight budgets are slowing teams down**

**23% of CMOs cite insufficient budget** as the top barrier to effective marketing, while **21.6% prioritise cost-effectiveness** and **20.6% prioritise ease of integration** when evaluating technology.

Position **Canva for Teams and Canva Enterprise** as a consolidation layer that replaces multiple point solutions for design, presentations, internal comms, and lightweight vide, reducing software sprawl, lowering agency reliance, and enabling teams to scale output without scaling cost.

**Brand governance is critical as marketing operates in isolation**

With **67.2% of marketing strategy decisions driven by the CMO or CEO**, and limited input from sales, data, or finance, marketing teams are under pressure to maintain brand credibility while supporting the wider organisation.

Position **Canva Brand Kits, locked templates, and approval workflows** as a governance framework that protects brand integrity while safely enabling sales, comms, and regional teams to self-serve content—reducing bottlenecks without sacrificing control.

**AI must deliver practical wins, not experimentation**

While **25% of marketers use AI for content creation**, only **13% apply it to data-driven decision-making**, highlighting a preference for immediate productivity gains over transformational use cases.

Frame **Canva's AI capabilities**, including Magic Design, Magic Write, automated resizing, background removal, and content generation, as embedded productivity tools that help teams create, adapt, and personalise assets faster across channels, without requiring advanced data maturity or operational change.

**Speed to market underpins acquisition, retention and ROI**

**20.3% of marketers cite customer acquisition and retention** as their biggest challenge, while **19.8% struggle to measure ROI**, reinforcing pressure to show fast, visible results.

Position **Canva's templates, real-time collaboration, and cross-format asset creation** as enablers of faster campaign turnaround, allowing teams to launch, iterate, and optimise content quickly across paid, owned, and internal channels, supporting measurable engagement outcomes.

**Adoption at scale determines Martech success**

With **32% of marketers identifying as laggards** and **user-friendly interfaces ranked above advanced analytics** as a buying criterion, adoption across the organisation is critical to realising value.

Position **Canva** as a platform marketing controls, that the whole business can use; driving rapid adoption across marketing, sales, and internal teams, and ensuring martech investment translates into execution, not shelfware.

# Thank you

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