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# Marketing at an Inflection Point

## *A Structural Diagnosis, and the Strategic Shifts Required Now*

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How to rebuild marketing for a noisier,  
less measurable world.

2026 Edition



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# 1.0 The Inflection Point: Why I Wrote This

I've been working in and around marketing since 2005, although I don't think my career properly began until 2011.

My first real taste of marketing came in the events industry. Back in 2005/2006, I was involved in trying to get people to attend an arts and music festival in Bournemouth. It was a small local event with a tiny budget and a very modest goal. If we could get 300 people through the gates, it would feel worthwhile.

The problem was we had almost nothing to spend. No radio, no ads, nothing meaningful beyond a few flyers and posters. So we did what you do when the only tool you've got is effort. We put posters up wherever they would stick, we talked to people in the street, we emailed everyone we knew, and we asked them to forward it on to everyone they thought may be interested. It was scrappy, a bit awkward at times, and I remember thinking, "This is going to be a slog."

That's when we decided to try something else.

MySpace was still new at the time, and it felt like a weird little frontier. We built a page for the event and started promoting it there. Then I noticed something important. All the bands, traders, and performers we'd booked had their own MySpace pages too, and they each had their own audience sitting right there.

So I asked them to help. I got them to promote the fact they were playing or trading at the event, and to tell their people to show up.

And then it started happening.

The event started to feel like it had a pulse. People were talking about it in chat rooms. I started getting emails and text messages from people who hadn't cared at all a week earlier, suddenly excited, asking who else was going, asking what time it started, asking if they should bring friends.

When the day arrived, we didn't get 300 people.

We got 10,000.

It was honestly a logistical headache. We'd planned the infrastructure for a few hundred at most, so it was chaos. But it also completely rewired something in me. I'd just watched attention form, spread, and multiply, not through money, but through networks, stories, and momentum. I saw what marketing could do when it really catches.

I was hooked.

Over the next couple of decades, I built a career that let me work across almost every marketing context you can imagine. Big consumer brands, consumer tech, ecommerce, agencies, B2B. Startups, founder-led SMEs, family businesses. I've held roles across digital marketing, analysis, research, and strategy. I've built and led teams. I've managed budgets ranging from mid-six figures per year through to multi-million pound monthly spend. I've been involved in work I'm genuinely proud of.

And for a long time, the world of marketing made sense.

Throughout the 2000s and 2010s, business was shifting to digital to meet growing demand. Budgets grew. Marketing gained influence. Experimentation was encouraged because the ROI often looked strong, and in many cases it really was. New platforms appeared, audiences moved online, targeting improved, measurement got more granular, and marketing felt like a high-leverage engine. You could build something and feel it working.

But as the 2010s went on, something started to feel a little off.

Then the pandemic hit in 2020. The initial response from businesses was fear, but in many consumer categories it quickly flipped into something closer to euphoria. Locked-down households bought at a rate I'd never seen before, and the sectors I was operating in at the time boomed.

And then it faded.

Since then, and if I'm honest this feeling began building before the pandemic, I've found it harder to ignore the sense that the ground has shifted under the profession.

Marketing started to feel more performative. Return became harder to prove. Where there had once been growing boardroom support, scepticism began creeping in. Attention became harder to earn as the world got noisier. Cut-through started to feel less like a craft and more like a gamble. The old playbooks didn't collapse overnight, but they stopped delivering like they used to.

I first felt the cracks around 2018. After the pandemic, I couldn't unsee them.

And since 2023, I've noticed a change in where my effort goes. Less time on growth work and building. More time navigating internal politics. More time trying to get buy-in, justify spend, defend strategy, and sometimes even justify the existence of marketing at all. The tone changed. The trust changed. Marketing lost its shine.

And I know I'm not alone in this. Previous colleagues, people in my network, social media posts, forum threads, blog posts, all seem to point to a similar feeling and a sense that things don't work the way they used to.

That shift is what led me to do this research.

Because I don't want to rely on a private feeling that something's wrong. I don't want this to be a vague hunch.

I want to move from instinct to diagnosis. I want observable and quantifiable reasons for why marketing is losing coherence, what forces are driving it, and what that means for how we operate now.

More than anything, I'm trying to understand whether this is simply a tough cycle, or whether marketing has entered a new regime entirely. A regime shaped by abundance, volatility, signal loss, diminishing returns, and now AI accelerating the noise. If that's true, then the core problem isn't that marketers suddenly forgot how to do their jobs. It's that we are trying to run a modern marketing reality using an outdated operating model.

If we want a future that works, we probably don't need another tactic.

We need a structural update.

## 1.1 Editorial Note

This report is not a claim to have discovered new laws of marketing, nor is it an attempt to create doctrine.

It is a practitioner's synthesis. I wrote it to help myself operate better inside the marketing environment as it exists now, and I'm sharing it publicly because I suspect others are feeling the same mismatch between the old playbook and the new conditions.

Most of the backbone here comes from the work of others: researchers, practitioners, analysts, and institutions who have already documented many of the forces and effects discussed in these pages. Where possible I cite it directly. My contribution is the attempt to assemble that work into a single defensible narrative, connect the dots, and translate it into an operating playbook I can use.

I should also be transparent about process: I used AI throughout this project to help with source discovery, synthesis, scrutiny, and drafting. It accelerated the work, but it did not remove the need for judgement. Where AI was useful, it was as an amplifier and a sparring partner, not an authority. Claims still needed to be checked, logic still needed to hold, and conclusions still needed to make sense in the real world.

In a way, that is part of the point. AI is not just changing marketing execution, it is changing how we learn, interpret evidence, and build operating models. This report is both about that shift and, unavoidably, a product of it.

If you disagree with parts of it, good. Treat it as a model, not a mandate. Use what helps, challenge what doesn't, and improve it for your context.

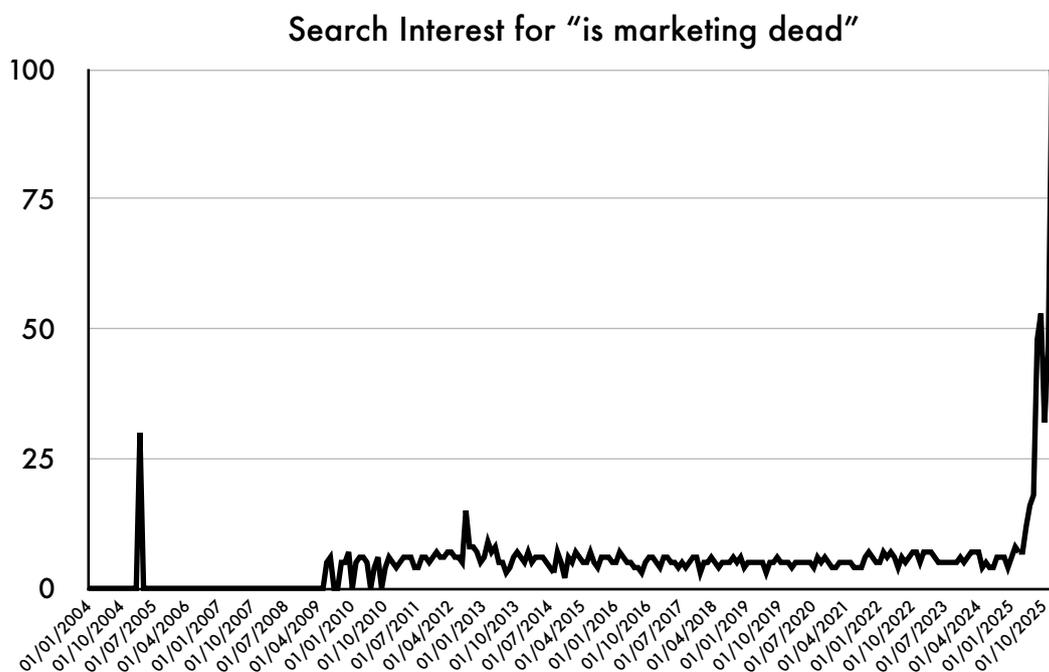
## 2.0 When a Profession Starts Asking Existential Questions

One of the simplest ways to test whether a private hunch is becoming a public question is to look at search behaviour.

When something becomes confusing, frustrating, or contested, people do not write essays about it first. They type a question into Google.

That is why I pulled a small sample from Google Trends using a deliberately blunt query: “is marketing dead” (worldwide, 2004 to present)<sup>1</sup>. Google Trends does not report absolute search volume. It normalises interest on a 0 to 100 scale, where 100 represents the peak popularity for the selected time period and region.

Even with that limitation, the pattern is hard to ignore.



Google Trends Feb 2026

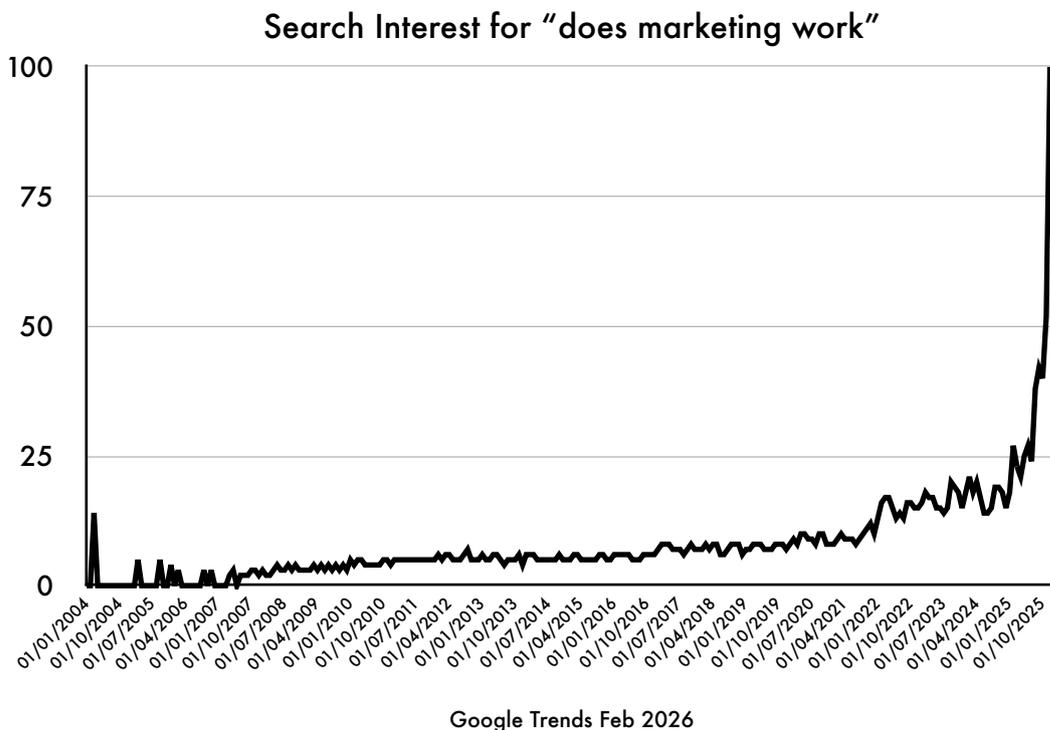
For most of the 2000s and 2010s, interest in this query is low and relatively flat. It shows up occasionally, but it does not look like a mainstream concern. Then, in 2025, it rises sharply. In the dataset I exported, the index peaks in December 2025 (100), with elevated levels continuing into January 2026 (73). The average level across 2025 is more than five times higher than the average across 2024 in the same export.

This is not proof that marketing is “dead”, and it is not even proof that marketing is failing. Search data is noisy. It is shaped by headlines, algorithmic surfacing, memes, and influencer discourse. It reflects curiosity and anxiety as much as it reflects reality.

<sup>1</sup> Google Trends (Google LLC), query: “is marketing dead”; Worldwide; Web Search; time range: 2004–present; accessed 15 Feb 2026; data downloaded as CSV from Google Trends.

But it is a useful diagnostic signal... and not the only one.

I repeated the process for similar queries to ensure this wasn't just noise from a particular article or published piece of content. Here's the same process used for "does marketing work"<sup>2</sup>.



Again, we see a similar pattern. And interestingly, here we see that this trend started to accelerate around 2020-2022.

It suggests that a growing number of people are not just asking "how do I do marketing better?" They are asking whether the thing still works at all, or whether the rules have changed so much that the category needs rethinking.

That shift in questioning matters, because marketing is downstream of belief. If leaders, operators, and founders start to suspect the old playbook is unreliable, behaviour changes. Budgets tighten. Proof demands rise. Time horizons shrink. Risk tolerance drops. Teams become defensive. The function starts to feel less like a growth engine and more like a cost centre that needs constant justification.

In other words, the search trend is not the argument. It is a clue that the argument is now in circulation.

And that is the premise of this report: not that marketing has suddenly stopped working, but that enough people are experiencing mismatch and diminishing certainty that they are turning to the most basic question a profession can face.

What is happening to marketing, and what do we do now?

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<sup>2</sup> Google Trends, "does marketing work" (search term), Worldwide, 2004–present (accessed 15 Feb 2026).

## 3.0 The Marketing World We Came From (1975-2025)

For most of the last 50 years, marketing lived in a world that, while never simple, was stable enough to learn, scarce enough to win, and predictable enough to plan.

You could build a career on playbooks that stayed true long enough to become instinct.

Not because marketers were smarter back then. Because the environment was more forgiving.

### 1) The world felt knowable

Back then, there were only so many ways to reach people.

Media was concentrated. Attention was scarce. Distribution was a real constraint. If you wanted scale, you generally had to go through a handful of pipes. TV, radio, print, outdoor, retail, events, later search and social.

That meant two things:

- **Planning mattered**, because the world didn't change shape every quarter.
- **Reach mattered**, because there were fewer places to get it.

Even when consumer behaviour was messy (and it always was), the system around it was stable enough that simplified models were still useful.<sup>3</sup>

#### **Mini-scene: the annual plan (you've lived this).**

It's late autumn. The leadership team wants "the plan" for next year. You've got a calendar, a budget grid, and a set of channel assumptions you can defend without feeling ridiculous. You know when demand peaks. You know what "a good quarter" looks like. You can talk about share-of-voice and spend levels with confidence. And once the plan is signed off, the world usually cooperates enough that you can execute it.

### 2) Marketing came with a "control panel"

This is the era where marketing became properly managerial.

You can see it in the frameworks that took over business thinking: the marketing mix, the 4Ps, the idea that if you get the right combination of product, price, place and promotion, you can shape demand.<sup>4</sup>

It also produced the planning move that's still at the heart of marketing today: **segmentation**.

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<sup>3</sup> Google, *Decoding Decisions: The Messy Middle of Purchase Behavior (Think with Google, 2020)*, PDF.

<sup>4</sup> Kotler, Philip, "A Lifetime in Marketing: Lessons Learned and the Way Ahead," *American Marketing Association (AMA)*, March 12, 2024

The belief that you can divide a market into meaningful groups, pick the ones you want, and compete through differentiation isn't a modern invention, it's foundational.<sup>5</sup>

From there, competitive strategy was increasingly framed as "owning a position", a durable mental slot in the customer's mind. In a world where channels and categories moved more slowly, "owning a position" felt like something you could actually do, and defend.<sup>6</sup>

And "brand" became something you could manage like an asset: build it, track it, protect it, invest in it over time. Brand equity thinking turned something fuzzy into something executives could talk about with confidence.<sup>7</sup>

### **3) Work happened in campaigns, not constant motion**

Marketing ran on a rhythm you could set your watch to:

- annual plans
- quarterly pushes
- seasonal peaks
- big launches
- big brand moments

You didn't have to be "always on" because you could buy attention in predictable ways. The language of media scheduling, continuity, flighting, pulsing-only makes sense in a world where attention is something you can reliably "book" and "time."<sup>8</sup>

#### **Mini-scene: the campaign heartbeat.**

A launch is coming. Everyone knows what week it "goes live." Creative is being finished. Media is being booked. Retail or sales has been briefed. You can feel the organisation synchronising around one moment in time. Then it runs. Then you get the first read-outs. Then there's a post-mortem. Then you take the learnings into the next cycle. It's not perfect, but it's coherent.

And because marketing ran in cycles, organisations built around it. Agencies, production, media buying, retail calendars, internal approval processes. The whole system aligned to a campaign heartbeat.

### **4) The funnel wasn't "true", it was useful**

Let's be honest: the funnel was always a simplification.

But it did something incredibly valuable: it gave teams a shared map of what they were doing.

Awareness → consideration → preference → purchase.

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<sup>5</sup> *Smith, Wendell R.*, "Product Differentiation and Market Segmentation as Alternative Marketing Strategies," *Journal of Marketing* 21, no. 1 (July 1956): 3–8

<sup>6</sup> *Ries, Al, and Jack Trout*, *Positioning: The Battle for Your Mind* (New York: McGraw-Hill, 1981)

<sup>7</sup> *Aaker, David A.*, *Managing Brand Equity: Capitalizing on the Value of a Brand Name* (New York: Free Press, 1991)

<sup>8</sup> *Pak, Mi hui*, "Media scheduling: Continuity vs. Flighting," WARC (ARF Knowledge)

Even if reality didn't behave neatly, funnel-style thinking helped organisations coordinate: what's the job of brand? what's the job of demand gen? what are we trying to move this quarter??

That's why it stuck. Not because it was perfect, but because it made complex work manageable.

## 5) "Brand vs performance" became the working compromise

As measurement improved, especially with digital, marketing didn't converge into one unified model. It split into two.

- **Brand:** long-term effects, memory, preference, mental availability.
- **Performance/activation:** short-term response, conversion, efficient capture.

Everybody knew the boundary was blurry. But it was a convenient organisational trade: different budgets, different creatives, different KPIs, different reporting timelines.

And over time, this became more than a team structure. It became doctrine, backed by effectiveness work that argued you need both long-term brand building and short-term activation for sustainable growth.<sup>10</sup>

## 6) The old measurement bargain: "credible enough"

Here's the most important part.

The old world didn't run on perfect measurement.

It ran on measurement that was **credible enough**.

So marketing became a discipline of proxy stacks and triangulation:

- reach/frequency
- brand tracking
- copy testing and pre-testing
- econometric models to allocate budgets
- dashboard metrics that were directionally useful

This is the measurement culture you see in every "marketing metrics" canon: not perfect causality, but enough signals to steer.<sup>11</sup>

When you needed a big-budget answer, you didn't pretend you could track every influence. You used aggregate models like marketing mix modelling, accepted as "good enough" for decision-making in messy real-world systems.<sup>12</sup>

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<sup>9</sup> Lavidge, Robert J., and Gary A. Steiner, "A Model for Predictive Measurements of Advertising Effectiveness," *Journal of Marketing* 25, no. 6 (October 1961): 59-62

<sup>10</sup> Binet, Les, and Peter Field, *The Long and the Short of It: Balancing Short and Long-Term Marketing Strategies* (IPA, 2013)

<sup>11</sup> Farris, Paul W., Neil T. Bendle, Phillip E. Pfeifer, and David J. Reibstein, *Marketing Metrics: The Definitive Guide to Measuring Marketing Performance* (Upper Saddle River, NJ: Pearson / Wharton School Publishing, 2010)

<sup>12</sup> Hanssens, Dominique M., "Market Response Models: Econometric and Time Series Analysis" (UCLA Anderson School of Management, 2005)

And as marketing budgets grew and scrutiny increased, the pressure to justify value became explicit: “show me the return,” “prove it works,” “connect it to outcomes.” Entire bodies of work emerged to help marketing speak the language of financial value.<sup>13</sup>

### **Mini-scene: the monthly performance review.**

You walk into a meeting with a dashboard. There’s a neat story in the numbers: reach is up, search demand is up, leads are up, sales are up (or... not). Nobody expects scientific certainty. What they want is confidence: “Are we roughly on track?” “What’s working?” “What are we changing next month?” It’s a world where proxies are tolerated because they’re useful, and because the system isn’t changing under your feet every week.

## **7) Digital briefly made us think we could see everything**

Then digital added something that felt like a superpower: instrumentation.

Clicks. Sessions. Conversion rates. Attribution paths. Dashboards that refreshed daily.

For a while, it felt like the discipline was evolving toward full accountability, finally we could see what worked, optimise in real time, and prove causality.

That expectation is literally encoded into the industry’s measurement debates: MMM vs multi-touch attribution, what can be credited, what can’t, and how you stitch it together.<sup>14</sup>

At the same time, research and platform narratives also admitted what practitioners already knew: customer decisions can be nonlinear and context-dependent, messier than the clean funnel implied, yet still manageable enough to influence with the right blend of brand and performance inputs.<sup>15</sup>

## **8) Why the old playbooks worked for so long**

Put it all together and you get why marketing playbooks held up for decades:

1. The world changed slowly enough for learning to stick.
2. Attention and distribution were scarce enough that winning them mattered.
3. Campaign cycles matched how the system worked.
4. The funnel and the brand/performance split were useful coordination tools.
5. Measurement didn’t have to be perfect, just credible enough to guide and justify.

So marketing became a profession built on repeatable heuristics: segmentation and positioning, consistent brand building, periodic campaigns, performance optimisation, and proxy-led measurement.

It wasn’t that marketing was easy.

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<sup>13</sup> Rust, Roland T., Katherine N. Lemon, and Valarie A. Zeithaml, “Return on Marketing: Using Customer Equity to Focus Marketing Strategy,” *Journal of Marketing* 68, no. 1 (January 2004)

<sup>14</sup> Interactive Advertising Bureau (IAB) and Mobile Marketing Association (MMA), *Marketing Attribution: The Definitive Guide to Marketing Mix Modeling and Multi-Touch Attribution* (guidebook, November 2019)

<sup>15</sup> Google, *Decoding Decisions: The Messy Middle of Purchase Behavior* (Think with Google, 2020), PDF.

It was that the world it operated in was **coherent enough** to make the craft accumulative.

## 4.0 The Regime Shift Now Underway (2026+)

If the last section was about the world marketing was built for, this one is about the world it is now operating inside.

In 2026, a lot of marketers have the same private thought: “I know what good marketing looks like, but the system no longer behaves the way I expect.”

That feeling is not just stress, or a bad quarter, or the usual platform churn. It is a structural shift in conditions. A new regime is forming, and the old operating model is starting to misfire inside it.

This regime shift is being driven by a handful of break forces that compound each other: abundance, volatility, signal loss, diminishing returns, and cross-functional complexity. AI is not a separate bullet point. It acts like a multiplier on every one of them.

### 4.1 The break forces

#### 1) Abundance is no longer a tailwind. It is the environment.

Marketing has always existed in competition, but the volume of supply entering the system has changed shape.

The clearest example is content. In April 2025, Ahrefs analysed 900,000 newly published web pages and found that **74.2% contained AI-generated content**.<sup>16</sup> That is a supply shock. Not because AI content is always bad, but because the marginal cost of producing “good enough” material is collapsing.

When supply becomes abundant, attention does not expand to match it. The noise floor rises. “Being present” becomes cheap. Being distinctive becomes expensive.

This is not limited to the web. On video platforms, the same dynamic is emerging. Kapwing describes the rapid growth of low-quality, AI-generated video content and estimates a meaningful portion of YouTube feeds may be comprised of what it calls “AI slop.”<sup>17</sup> You do not need to agree with every estimate to take the underlying point seriously: industrial output is now normal.

#### **Mini-scene: the Monday content stand-up**

You open the content calendar and it is full. The team can ship more than ever. The problem is not production. The problem is impact. Posts go out, pages go live, videos publish, and the world barely moves. Nobody complains about the work. They complain about the results.

That is the abundance regime. Output is plentiful. Attention is scarce.

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<sup>16</sup> Law, Ryan; Guan, Xibei; and Soulo, Tim, “What Percentage of New Content Is AI-Generated?” Ahrefs Blog, May 19, 2025

<sup>17</sup> Curtis, Liam, “AI Slop Report: The Global Rise of Low-Quality AI Videos,” Kapwing Blog, November 28, 2025

## 2) Volatility is no longer occasional. It is built into distribution.

The old regime allowed planning because the major pipes behaved consistently for long stretches of time. The new regime punishes assumptions. The interface between people and information can change in weeks, and those changes can alter the economics of reach.

Search is the cleanest example. Google has expanded AI Overviews and introduced “AI Mode,” a more conversational search experience designed to answer queries directly.<sup>18</sup> This is not simply a new feature. It changes where value accrues. It also changes what “visibility” means, because being “ranked” is not the only outcome anymore.

The stakes are high enough that the ecosystem is already pushing back. Reuters reports that European publishers have filed an EU antitrust complaint concerning Google’s AI Overviews, arguing that these systems use publisher content while harming traffic and revenue.<sup>19</sup> The politics will play out over time, but the implication for marketers is immediate: distribution is becoming more contested, more mediated, and less predictable.

**Volatility creates a practical planning problem:** you can be doing good work and still be wrong, because the environment moved underneath you.

## 3) Signal loss is narrowing visibility, while expectations stay high.

The story most executives still believe is “marketing is measurable now.” The story marketers are living is “measurement is constrained, fragmented, and increasingly modelled.”

Industry bodies are blunt about what is happening. IAB frames the shift toward first-party data and new measurement approaches as a response to privacy regulation and signal loss.<sup>20</sup> IAB Europe’s 2025 research makes it even more operational: the most cited barrier to addressability and measurement improvement is **lack of cross-platform data access and transparency (68%)**, alongside privacy regulation (58%) and signal loss (48%).<sup>21</sup>

This is not just industry commentary. Academic work on Apple’s App Tracking Transparency provides causal evidence of how privacy changes can impact targeted advertising and its effectiveness.<sup>22</sup> Again, you do not need to interpret every result the same way to accept the direction of travel: the system is less observable than it was.

WARC summarises the outcome clearly. As the pool of usable data shrinks, brands lean harder on modelling, experimentation, and imperfect proxies, while the desire for certainty does not disappear.<sup>23</sup>

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<sup>18</sup> *Stein, Robby*, “Expanding AI Overviews and introducing AI Mode,” *Google (The Keyword)*, March 5, 2025

<sup>19</sup> *Chee, Foo Yun*, “European Publishers Council files EU antitrust complaint about Google’s AI Overviews,” *Reuters*, February 10, 2026

<sup>20</sup> *Interactive Advertising Bureau (IAB) and BWG Strategy*, *State of Data 2024: How the Digital Ad Industry Is Adapting to the Privacy-by-Design Ecosystem* (report, March 2024)

<sup>21</sup> *IAB Europe*, “Adoption of Addressability and Measurement Solutions Across Europe,” *IAB Europe*, November 26, 2025

<sup>22</sup> *Aridor, Guy, and Yeon-Koo Che*, “Privacy Regulation and Targeted Advertising: Evidence from Apple’s App Tracking Transparency” (Toulouse School of Economics, 2024), PDF

<sup>23</sup> *Garcia Smith, Yeimy, and Michelle Snell*, “Four key trends in Marketing Measurement for 2025,” *WARC (Opinion)*, October 15, 2024

### **Mini-scene: the attribution meeting**

Someone asks for the channel that “caused” the revenue drop. The dashboard gives an answer, but everybody knows it is a partial view. You are expected to speak with confidence about a system you cannot fully see. You leave the meeting feeling like you are defending a story, not reporting a measurement.

That tension is not going away. It is becoming the normal state.

### **4) Diminishing returns show up as rising costs, shorter half-lives, and harder wins.**

As abundance rises and signal falls, efficiency gets harder to hold. Even if you are good at optimisation, the surface area you can optimise is smaller, and the system is noisier.

At the same time, budgets are not expanding to compensate. Gartner’s 2025 CMO Spend Survey reports that marketing budgets have flatlined at **7.7% of company revenue**, the same as the prior year.<sup>24</sup> That means many teams are asked to deliver growth in a harsher environment with a stable share of resources.

This is one of the hidden drivers behind the mood in modern marketing. It is not that marketers forgot how to do the job. It is that the job now has tougher physics.

### **5) Cross-functional complexity is making marketing outcomes harder to “own.”**

Marketing has always influenced outcomes it cannot fully control, but the gap is widening.

Buying journeys are more fragmented, involve more stakeholders, and stall more often. Forrester reports that **86% of B2B purchases stall** during the buying process, and **81% of buyers are dissatisfied** with the provider they ultimately choose.<sup>25</sup> That is a strong indicator that many outcomes sit inside messy organisational and decision dynamics, not just inside campaigns.

Gartner’s work on the B2B buying journey reinforces this picture: journeys are nonlinear, buying groups are complex, and influence is distributed across digital and human interactions.<sup>26</sup> In practice, this means that growth increasingly depends on coordination across product, sales, customer success, operations, and data infrastructure.

Gartner’s view of CMO priorities also reflects this reality: leaders are being pushed toward cross-functional work in a more demanding environment.<sup>27</sup>

Marketing is still accountable, but it is less “in control” than the old operating model assumes.

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<sup>24</sup> *Gartner*, “Gartner 2025 CMO Spend Survey reveals marketing budgets have flatlined at seven percent of overall company revenue,” *Gartner Newsroom* (press release), May 12, 2025

<sup>25</sup> *Forrester*, “The State Of Business Buying, 2024,” *Forrester Press Release*, February 27, 2024

<sup>26</sup> *Gartner*, “B2B Buying Journey,” *Gartner Sales Insights*

<sup>27</sup> *Gartner*, “Gartner Identifies Top Three Priorities for CMOs to Deliver Marketing Excellence in 2025,” *Gartner Newsroom* (press release), December 3, 2024

## 4.2 AI as a regime accelerant

It is tempting to treat AI as a tool layer on top of the existing system. That undersells it.

AI changes the economics of production, the shape of distribution, and the expectations inside organisations. It makes it easier to generate work, but it also makes it easier for everyone else to generate work too. That is the accelerant effect.

The Stanford AI Index shows how quickly AI has moved into mainstream business usage. It reports a steep rise in organisational adoption and the use of generative AI in business functions over 2024.<sup>28</sup> McKinsey's research adds the strategic layer: organisations that capture value are not simply "using AI," they are rewiring workflows, governance, and operating models.<sup>29</sup>

So AI increases output, increases competition, and increases the speed at which the environment changes. It also changes the interface layer, which matters for the next break force.

## 4.3 Supply shock to content and creative, and the rising noise floor

The abundance regime becomes most obvious in content and creative.

When AI lowers production costs, the world fills with "good enough." The result is a higher noise floor, not a richer information environment. This is why the Ahrefs 74.2% figure matters. It signals a structural shift in supply, not a passing trend.

The practical consequence is that differentiation becomes the scarce resource. Not content. Not activity. Differentiation.

## 4.4 Faster creative decay and rising sameness

As more brands use similar tools, prompts, templates, and formats, a second-order effect appears: sameness.

In a crowded environment, sameness decays fast. The shelf life of "pretty good" creative shortens, because the audience is exposed to too much of it.

Attention research helps explain the mechanism. Lumen's work highlights that a large portion of technically viewable ads are simply ignored, which means you can pay for reach and still not get attention.<sup>30</sup> System 1's argument is the economic consequence: dull creative has an extraordinary cost because it wastes budget on work that fails to generate memorability or emotional response.

This pushes marketing teams into a tougher creative loop: more demand for distinctiveness, faster refresh cycles, and less tolerance for generic output.

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<sup>28</sup> Stanford Institute for Human-Centered Artificial Intelligence (HAI), *AI Index Report 2025 (report, PDF, 2025)*

<sup>29</sup> McKinsey & Company, "The State of AI: How organizations are rewiring to capture value," McKinsey (QuantumBlack Insights)

<sup>30</sup> Lumen Research, "From Made for Advertising to Made for Attention," Lumen Research (report landing page)

## 4.5 Measurement and attribution get harder, not easier

In the old story, marketing became measurable and therefore manageable. In the new regime, measurement is still essential, but it is constrained and fragmented.

WARC outlines the trend lines: diminishing data, more modelling, and a growing need for experimentation and triangulation rather than single-source certainty.<sup>31</sup> IAB and IAB Europe reinforce the operational reality: signal loss and cross-platform opacity are core constraints, not implementation issues.<sup>32 33</sup>

This does not mean “measurement is dead.” It means the organisation has to mature past simplistic certainty. The job becomes less about producing perfect attribution, and more about building decision systems that can operate under partial visibility.

## 4.6 New gatekeeper dynamics: assistants, AI answers, and citations

A major structural change is happening at the point of discovery: answers are becoming the interface.

Pew’s research shows that when an AI summary appears in Google search results, users click traditional links **8%** of the time, compared to **15%** when no AI summary appears.<sup>34</sup> That is not a small shift. It suggests a material reduction in click-through when the platform satisfies intent without requiring a visit.

Google’s AI Mode and expanded AI Overviews reflect the same direction: more intent fulfilment on platform, and a different relationship between queries and publishers.<sup>35</sup>

At the same time, “answer engines” are rising as a new layer of gatekeeping. OpenAI’s positioning for ChatGPT search is explicitly about providing answers with links to sources.<sup>36</sup> Perplexity describes itself in similar terms, with citations and sourced responses as a core feature.<sup>37</sup>

This creates a new dynamic for marketers. Ranking and reach still matter, but so does being the thing that gets referenced. In a world of cited answers, authority and source-worthiness become distribution advantages.

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<sup>31</sup> *Garcia Smith, Yeimy, and Michelle Snell, “Four key trends in Marketing Measurement for 2025,” WARC (Opinion), October 15, 2024*

<sup>32</sup> *Interactive Advertising Bureau (IAB) and BWG Strategy, State of Data 2024: How the Digital Ad Industry Is Adapting to the Privacy-by-Design Ecosystem (report, March 2024), PDF*

<sup>33</sup> *IAB Europe, “Adoption of Addressability and Measurement Solutions Across Europe,” IAB Europe, November 26, 2025*

<sup>34</sup> *Pew Research Center, “Google users are less likely to click on links when an AI summary appears in the results,” Pew Research Center (Short Reads), July 22, 2025*

<sup>35</sup> *Stein, Robby, “Expanding AI Overviews and introducing AI Mode,” Google (The Keyword), March 5, 2025*

<sup>36</sup> *OpenAI, “Introducing ChatGPT search,” OpenAI (product announcement), October 31, 2024 (updated February 5, 2025)*

<sup>37</sup> *Perplexity, “What is an answer engine, and how does Perplexity work as one?” Perplexity Help Center*

## **4.7 The mismatch thesis: the old operating model inside a new environment**

Put all of this together and a simple mismatch appears.

Most marketing operating models were built for a regime with:

- more stable distribution,
- more observable performance signals,
- lower content supply,
- longer creative half-lives,
- and clearer boundaries between functions.

The regime now forming has the opposite conditions:

- abundance and a higher noise floor,
- volatile distribution and shifting interfaces,
- signal loss and measurement constraints,
- faster creative decay and higher sameness risk,
- cross-functional complexity in buying and growth,
- and flat budgets combined with rising expectation.

That is why marketing feels like it is losing coherence in 2026. Not because marketers are failing. Because the environment is changing, and the inherited playbook is no longer optimised for the new physics.

This is the regime shift now underway.

## 5.0 The 30 Signals

Section 4 made the case that marketing has moved into a different environment: more abundance, more volatility, weaker signals, diminishing returns, and higher cross-functional complexity, with AI accelerating most of it.

This section is where that claim becomes tangible.

Not through one headline statistic. Through a pattern. Thirty signals that, when you place them next to each other, paint a consistent picture: the marketing function is under more pressure, working with less visibility, operating on more mediated rails, carrying more complexity, paying more for less impact, and dealing with rising integrity and trust problems.

To keep it readable, we move through the signals as a story:

Pressure rises → visibility falls → discovery shifts → complexity inflates → effectiveness decays  
→ trust erodes → commerce concentrates → insight gets cut.

### 5.1 Pressure rises: the function is squeezed economically

#### **Signal 1: Marketing budgets have flatlined as a share of revenue.**

Gartner reports marketing budgets in 2025 remained around 7.7% of company revenue, broadly flat year-on-year.<sup>38</sup>

On its own, “flat” doesn’t sound dramatic. But in a world where marketing has become harder (more channels, weaker measurement, faster creative decay), flat budgets become a structural constraint. If the environment gets tougher and your share of resources does not rise, you inevitably get pushed into trade-offs: fewer experiments, less patience, and more internal justification work.

#### **Signal 2: CMOs report they do not have enough budget to execute strategy.**

In the same survey release, Gartner notes 59% of CMOs say they lack the budget required to deliver their strategy.

This is not just “we’d like more money.” It’s a gap between what leadership expects marketing to achieve and what it is resourced to do. That gap tends to produce predictable behaviours: risk reduction, short-termism, and the slow erosion of “craft” work (insight, creative development, long-cycle brand building) in favour of what can be defended this quarter.

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<sup>38</sup> *Gartner*, “Gartner 2025 CMO Spend Survey reveals marketing budgets have flatlined at seven percent of overall company revenue” (marketing budgets ~7.7% of company revenue; 59% of CMOs say budgets are insufficient to execute strategy), *Gartner Newsroom* (press release), May 12, 2025

### **Signal 3: The CMO role remains unusually unstable.**

Spencer Stuart's 2025 CMO tenure study continues to frame marketing leadership as a role under structural change and turnover pressure.<sup>39</sup>

Short tenure matters because it signals something deeper than performance. It suggests the organisation is still negotiating what marketing is for, how it should be measured, and what "good" looks like. When those things are contested, the marketing leader becomes a natural pressure valve.

#### **Mini-scene: "The plan becomes a defence document."**

You start Q1 thinking about customers and growth. By Q2, the energy shifts. The deck is no longer "here's what we're going to do." It becomes "here's why what we did was rational." Reporting expands. The cadence tightens. The team spends more time explaining performance than improving performance.

## **5.2 Visibility falls: signal loss breaks the performance-era promise**

### **Signal 4: Privacy change and signal loss degrade targeting and measurement.**

IAB's State of Data describes the shift toward privacy-by-design and the operational reality of working with reduced signal and greater reliance on modelling.<sup>40</sup>

This matters because it collides with a very strong organisational expectation created during the performance era: the expectation that marketing can be observed with near-scientific clarity. Many organisations still believe the dashboard represents reality. But increasingly, dashboards represent a model of reality, built from partial inputs.

### **Signal 5: Cross-platform access and transparency becomes the biggest addressability barrier.**

IAB Europe's study reports lack of cross-platform data access and transparency as the top addressability/measurement challenge, cited by 68% of respondents.<sup>41</sup>

This is the practical headache under most "attribution arguments." Even if each platform can tell a compelling story about performance in isolation, the moment you try to reconcile those stories across ecosystems, confidence drops. Budget allocation becomes harder to defend, and optimisation becomes less clean.

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<sup>39</sup> *Spencer Stuart, CMO Tenure Study 2025: The Evolution of Marketing Leadership (report)*

<sup>40</sup> *Interactive Advertising Bureau (IAB) and BWG Strategy, State of Data 2024: How the Digital Ad Industry Is Adapting to the Privacy-by-Design Ecosystem (report, March 2024), PDF*

<sup>41</sup> *IAB Europe, "Adoption of Addressability and Measurement Solutions Across Europe," IAB Europe, November 26, 2025*

### **Mini-scene: “A simple question turns political.”**

Someone senior asks: “Which channel drove the growth?”

You can answer, but only with caveats: attribution windows, incrementality assumptions, cross-channel interactions, modelling limitations. You’re being accurate. The room hears uncertainty. Someone else offers a simpler story. The simpler story wins.

## **5.3 Discovery shifts: distribution becomes mediated, not clicked**

### **Signal 6: AI summaries and answer engines reduce outbound clicks.**

Pew Research found users clicked traditional links less often when an AI summary appeared (8% vs 15% when no summary appeared).<sup>42</sup>

This is not just a search trend. It changes the economics of content and SEO. Many marketing models assume visibility becomes traffic, and traffic becomes value. When platforms fulfil intent on-platform, visibility can increase while traffic declines, which breaks the old bargain.

### **Signal 7: Agentic AI becomes a new layer between customers and suppliers.**

The key change is not “AI exists,” it’s that the interface becomes more automated: systems choose what to summarise, what to recommend, and increasingly what to do next. Gartner’s warnings about “agent washing” and cancellation risk are a good anchor that this is already becoming a board-level technology risk, not just a marketing curiosity.<sup>43</sup>

For marketing, that means influence shifts away from persuading a human in a feed, and toward shaping what systems consider credible, relevant, and safe to recommend.

### **Signal 8: Big Tech gatekeepers control the rails, and rules change under you.**

When discovery and distribution run through a small number of chokepoints, marketing becomes structurally dependent. The UK’s digital markets regime is one example of policy recognising the gatekeeper reality.<sup>44</sup>

Even if regulation improves fairness over time, the day-to-day implication for marketers is ongoing rule change, evolving constraints, and volatility that is outside the team’s control.

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<sup>42</sup> **Pew Research Center**, “Google users are less likely to click on links when an AI summary appears in the results,” Pew Research Center (Short Reads), July 22, 2025

<sup>43</sup> **Gartner**, “Gartner Predicts Over 40% of Agentic AI Projects Will Be Canceled by End of 2027” (notes “agent washing” and cites escalating costs, unclear business value, and inadequate risk controls), Gartner Newsroom (press release), June 25, 2025

<sup>44</sup> **UK Government (Department for Business and Trade)**, “How the UK’s digital markets competition regime works,” GOV.UK (guidance)

### **Mini-scene: “Nothing changed, but performance did.”**

You didn't change the site. You didn't change the creative. You didn't change the budget. But organic traffic drops, or paid efficiency declines, or a platform suddenly recommends different content. You're asked what you did wrong. The honest answer is: you didn't do anything wrong. The system moved.

## **5.4 Complexity inflates: marketing gets harder to run well**

### **Signal 9: The digital ecosystem keeps growing and fragmenting.**

IAB Europe's AdEx reporting shows continued market growth and channel rebalancing.<sup>45</sup>

Growth sounds positive, but fragmentation creates a hidden tax. Every new channel, format, and ecosystem adds planning overhead, measurement complexity, creative variation demands, and organisational coordination. It becomes easier to be “busy” and harder to be “effective.”

### **Signal 10: Martech sprawl is now a management problem.**

Chiefmartec's 2025 landscape counts 15,384 martech solutions.<sup>46</sup>

That number is not interesting because it's large. It's interesting because it reflects the structural environment: marketing is trying to solve a complex, shifting problem with tooling. The result is stack growth, integration work, governance burden, and constant change management.

### **Signal 11: Martech underutilisation remains high despite investment.**

Gartner reports martech utilisation at 49%.<sup>47</sup>

In CFO language, underutilisation reads as waste. In operator language, it often means “we are managing an ecosystem, not a tool.” Skill gaps, integration complexity, and process constraints prevent organisations from extracting value. This becomes an internal credibility issue even when the root causes are structural.

### **Mini-scene: “The machine eats the team.”**

The stack grows. The workflow fragments. You add tools to save time, but you spend more time stitching the tools together. Meetings multiply. The function looks expensive and busy, but speed goes down. Senior leadership starts asking why marketing needs so many people to do what used to be simpler.

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<sup>45</sup> IAB Europe, AdEx Benchmark 2024 Report (report, released May 21, 2025), PDF

<sup>46</sup> Brinker, Scott, and Frans Riemersma, “2025 Marketing Technology Landscape Supergraphic: 100x Growth Since 2011 But Now With AI” (15,384 solutions), Chiefmartec, May 2025

<sup>47</sup> Gartner, “Maximize ROI With Marketing Technology (Martech)” (notes the 2025 Gartner Marketing Technology Survey finding that martech utilization has dropped to ~49%), Gartner (marketing technology topic page)

## 5.5 Effectiveness decays: you pay more for less

### **Signal 12: Viewability is not attention; many viewable ads are ignored.**

Lumen cites findings that a large share of technically viewable ads receive no attention, and the headline that many viewable ads are ignored has become a core argument in the attention measurement movement.<sup>48</sup>

The implication is brutal: you can buy “delivery” without buying impact. When dashboards celebrate impressions and viewability, but the audience simply does not look, marketing can look healthy while commercial outcomes disappoint.

### **Signal 13: Creative effectiveness is slipping; dull advertising is expensive waste.**

System1’s “Extraordinary Cost of Dull” frames dull creative not as “a shame,” but as a measurable cost problem.<sup>49</sup>

In abundance environments, generic creative does not merely underperform. It actively burns budget because it fails to create memory structures, preference, or distinctiveness. The consequence is more spend required to achieve the same effect, which feeds the “marketing is getting less efficient” sentiment.

### **Signal 14: Budget mix keeps tilting toward short-term performance at the expense of brand.**

WARC (drawing on The CMO Survey) reports rising emphasis on short-term performance budgets and declining brand investment share.<sup>50</sup>

This shift is understandable under pressure. But it creates fragility. Brand is the part of the system that makes performance more efficient over time by shaping preference and reducing price sensitivity. When brand is underfed, performance becomes more expensive, which increases pressure, which pushes teams further into short-termism. It’s a loop.

### **Signal 15: Rising CAC and diminishing returns show up as performance fragility.**

This is the lived expression of 12–14. When attention is scarce, creative is blander, and investment skews short-term, you begin to feel a creeping reality: the easy wins are gone. Even strong teams need more budget to produce the same growth, and volatility increases. The core mechanism is supported by attention and creative evidence already cited.

### **Mini-scene: “Quarterly clarity replaces strategy.”**

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<sup>48</sup> *Lumen Research*, “From Made for Advertising to Made for Attention,” Lumen Research (report landing page)

<sup>49</sup> *System1 Group*, *The Extraordinary Cost of Dull: Why Boring Advertising Must Die* (whitepaper, 2023)

<sup>50</sup> *WARC*, “Performance budgets rise at expense of brand” (based on *The CMO Survey*), *WARC (The Feed)*

The organisation starts rewarding what produces short-term movement, because that is what can be seen. Brand work gets squeezed because it is harder to prove. Six to twelve months later, acquisition gets harder, conversion gets noisier, and everyone asks why the engine feels weaker. The answer is: you optimised the visible part and starved the invisible part.

## 5.6 Integrity and trust break: media quality and deception rise

### **Signal 16: Programmatic opacity creates leakage and mistrust.**

Supply chain transparency studies (including ANA's work and ISBA/PwC) highlight persistent difficulty tracing where spend goes and what value is actually delivered.<sup>51</sup>

Even if performance appears strong, opacity creates suspicion. And suspicion erodes marketing's internal credibility faster than any single missed target.

### **Signal 17: Bots and invalid traffic distort analytics and waste spend.**

Imperva's Bad Bot reporting documents the scale and evolution of automated traffic.<sup>52</sup>

This is not just "fraud exists." It is that fraud contaminates optimisation. If your inputs are corrupted, your experiments lie, your attribution misleads, and your dashboards can celebrate progress that is not real.

### **Signal 18: Even premium channels are not immune to integrity problems.**

The point is not "CTV is broken." The point is that as systems become more automated and complex, verification becomes harder everywhere. The bot and automation evidence provides the backdrop for how sophisticated invalid activity has become.<sup>53</sup>

### **Signal 19: Synthetic content and deepfakes erode baseline trust.**

When synthetic media scales, trust becomes a scarcer resource. The EU's work on transparency and AI-generated content reflects the policy-level response to that reality.<sup>54</sup>

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<sup>51</sup> *Association of National Advertisers (ANA), ANA Programmatic Media Supply Chain Transparency Study (report, December 2023)*

<sup>52</sup> *Imperva (a Thales company), 2025 Bad Bot Report: The Rapid Rise of Bots and the Unseen Risk for Business (report, PDF, 2025)*

<sup>53</sup> *Imperva (a Thales company), 2025 Bad Bot Report: The Rapid Rise of Bots and the Unseen Risk for Business (report, PDF, 2025)*

<sup>54</sup> *European Commission, "Code of Practice on marking and labelling of AI-generated content," Shaping Europe's digital future (Digital Strategy)*

## **Signal 20: Labelling and transparency requirements add workflow friction.**

Even if labelling is beneficial, it introduces new governance requirements into already complex workflows. Transparency obligations are being formalised to support compliance.

## **Signal 21: Fake reviews and dark patterns are now active regulatory targets.**

The FTC's final rule banning fake reviews and testimonials is a clean example of regulation hardening around deception.<sup>55</sup>

This matters because the trust crisis is not a "marketing story." It's a system story that marketing inherits.

## **Signal 22: "Agent washing" and AI hype produce failed projects and credibility scars.**

Gartner's prediction that a significant share of agentic AI projects will be cancelled, alongside its "agent washing" framing, is a strong anchor for the organisational danger: a wave of rushed initiatives that fail, leaving scepticism and fatigue behind.<sup>56</sup>

### **Mini-scene: "You hit KPIs and still lose trust."**

Your campaign hits the platform metrics. The dashboard says success. But sales does not feel it, service does not feel it, leadership does not feel it. Someone asks, "How much of this traffic was real?" No one can answer cleanly. From that moment, every number becomes slightly suspect.

## **5.7 Commerce concentrates: marketplaces and retail media reshape power**

### **Signal 23: Retail media is exploding and adds another walled garden.**

Retail media has become one of the major structural shifts in ad markets, tied to commerce data and closed measurement systems. IAB Europe's market tracking is a useful anchor for the broader rebalancing and growth context.<sup>57</sup>

The practical implication is new silos. New measurement regimes. New pay-to-play tolls where access to demand is bundled with the platform's rules.

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<sup>55</sup> *Federal Trade Commission (FTC)*, "Federal Trade Commission Announces Final Rule Banning Fake Reviews and Testimonials," FTC Press Release, August 14, 2024

<sup>56</sup> *Gartner*, "Gartner Predicts Over 40% of Agentic AI Projects Will Be Canceled by End of 2027" (warns of "agent washing", defined as vendors rebranding existing products such as assistants, RPA and chatbots without substantial agentic capability), Gartner Newsroom (press release), June 25, 2025

<sup>57</sup> *IAB Europe*, AdEx Benchmark 2024 Report (report, released May 21, 2025), PDF

## **Signal 24: Retail media measurement fragmentation drives standards work.**

IAB Europe's retail media measurement standards exist precisely because fragmentation and inconsistency are a barrier.<sup>58</sup>

When standards need to be invented, it signals a young ecosystem with uneven accountability. Marketers inherit that uncertainty.

## **Signal 25: Commerce gravity wells concentrate discovery and margin power.**

Strategy institutions are now openly framing Amazon and Walmart as competing retail gravity wells, which is a proxy for a deeper truth: discovery increasingly happens inside marketplaces.<sup>59</sup>

When that happens, marketing begins to look like a toll. The brand can create demand, but the last mile is controlled by someone else who can charge for access and data.

### **Mini-scene: "You can create demand, but you cannot capture it cleanly."**

Your brand work increases preference. Your campaigns create interest. But the purchase journey ends inside a marketplace where placement is auctioned and data is withheld. The business asks why margins are tighter even when demand is up. The answer is: the gatekeeper owns the last mile.

## **5.8 Volatility rises: planning horizons shorten**

### **Signal 26: Uncertainty shortens horizons and increases caution.**

IAB Europe's AdEx reporting explicitly frames market conditions through geopolitical and regulatory context, alongside broader macro pressures.<sup>60</sup>

Short horizons increase the tendency to favour tactics with immediate visibility, which amplifies Signal 14 and makes long-cycle learning harder to sustain.

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<sup>58</sup> IAB Europe, *Retail Media Measurement Standards (guidance, PDF)*

<sup>59</sup> Hou, Young; Kalogeropoulos, Demitri; and Sesia, Aldo, *Walmart Inc., Amazon.com, and the Future of Retail (case S-0459, Darden Business Publishing, published July 17, 2025)*

<sup>60</sup> IAB Europe, *AdEx Benchmark 2024 Report (report, PDF)*

## 5.9 The open web strains: the old content bargain weakens

**Signal 27: Publisher economics are strained as traffic sources shift.**

Pew's AI-summary click behaviour gives a mechanism for why the open web can weaken even when "search usage" remains high.<sup>61</sup>

Some publishers and outlets have also reported significant concern about AI-driven "zero click" dynamics and its commercial impact, although the magnitude is debated and varies by query and category.<sup>62</sup>

## 5.10 Regulation escalates: more constraint, more change

**Signal 28: Digital competition enforcement increases.**

The UK's digital markets competition regime is policy recognition of the gatekeeper reality and introduces new constraints and enforcement dynamics.<sup>63</sup> [6]

For marketing, this often translates to more ongoing change: new rules, new restrictions, new compliance overhead, and shifting access to data and distribution.

## 5.11 Insight gets cut: understanding declines while difficulty rises

**Signal 29: Research and in-year insight is being cut even as complexity rises.**

This is one of the most quietly dangerous signals, because it predicts confusion. When visibility falls and complexity rises, insight becomes more valuable, not less. Cutting it makes organisations more dependent on assumptions and dashboards.

**Signal 30: Brand equity measurement is widely seen as inadequate in the digital era.**

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<sup>61</sup> *Pew Research Center*, "Google users are less likely to click on links when an AI summary appears in the results," *Pew Research Center (Short Reads)*, July 22, 2025

<sup>62</sup> *Sweney, Mark*, "'Existential crisis': how Google's shift to AI has upended the online news model," *The Guardian*, September 6, 2025

<sup>63</sup> *UK Government (Competition and Markets Authority)*, "How the UK's digital markets competition regime works" (guidance under the Digital Markets, Competition and Consumers Act 2024), GOV.UK, published 7 Jan 2025, last updated 23 Jan 2025

If long-term effects are hard to measure credibly, brand becomes harder to defend. That reinforces the drift toward performance-only thinking described by WARC/The CMO Survey.<sup>64</sup>

Over time, this erodes resilience: you weaken the part of the system that makes performance more efficient.

### **Mini-scene: “The function becomes activity-rich and understanding-poor.”**

Dashboards fill up. Campaigns ship. Tools proliferate. But fewer people can answer simple questions about why customers choose you, what they truly value, and what would change their behaviour. The organisation becomes louder and less certain at the same time.

## **What this adds up to**

You can argue with individual signals. You cannot easily argue with the shape they form together.

- marketing is squeezed economically
- measurement is constrained, fragmented, and more model-driven
- discovery is more mediated and less click-based
- complexity inflates faster than capability
- attention and creativity become the new scarcity
- integrity and trust problems contaminate measurement and credibility
- commerce concentration makes demand capture more pay-to-play
- insight is cut as difficulty rises, which worsens strategy quality

This is exactly what you would expect if Section 4 is correct: marketing is being run with assumptions shaped by the old world, while the environment increasingly behaves like a new one.

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<sup>64</sup> WARC, “Performance budgets rise at expense of brand” (based on The CMO Survey by Deloitte, Duke University’s Fuqua School of Business, and the American Marketing Association), WARC (The Feed), November 29, 2024

## 6.0 The Meta-Diagnosis

Section 5 was not a list. It was a pattern.

Thirty different signals, across budgets, platforms, measurement, creative, trust, commerce, and org design, and yet they keep landing in the same place. Marketing is being squeezed harder, while seeing less clearly, while being asked to do more, with fewer reliable levers.

If you step back far enough, the signals stop looking like separate problems marketers are dealing with. They start looking like symptoms of one environmental shift.

So here is the meta-diagnosis.

### 6.1 What the 30 signals have in common

Across the full stack, the signals rhyme in five ways.

#### 1) **The world got noisier, and the cost of attention moved upstream.**

The supply of content, ads, messages, creative, and persuasion tactics has exploded. At the same time, creative lifespans are shortening and sameness is rising. That produces a higher noise floor. Which means you cannot rely on more output to create more impact. You need distinctiveness and craft, which are the very things that get squeezed when pressure rises.

#### 2) **Distribution got more mediated, with fewer clean paths between intent and action.**

Discovery is shifting away from simple search to click to website journeys and toward platform-native journeys, answer layers, feeds, assistants, marketplaces, retail media, and closed ecosystems. Marketing still happens, but the rails are different. You are often renting access rather than owning it, and the interfaces between you and the customer are thickening.

#### 3) **Observability is declining, so certainty becomes theatre.**

As signal weakens through privacy constraints, platform walls, ID fragmentation, and black-box algorithms, measurement does not get cleaner. It gets more model-driven, more probabilistic, more contested. In a declining-signal world, the demand for certainty does not disappear. If anything, it increases. That is how you end up with attribution fights, overconfident dashboards, and leadership conversations that oscillate between prove it worked and why can't you prove it worked.

#### 4) **Complexity is inflating faster than capability.**

The number of tools, channels, formats, governance demands, and coordination requirements has grown massively. But headcount and budgets are not rising in proportion. So the function takes on a chronic coordination tax. More meetings, more handovers, more dependencies, more approvals, more risk management, and less actual creation and learning.

## 5) Trust and integrity are becoming first-order constraints.

Fraud, bots, fake reviews, synthetic content, deepfakes, and incentives to manipulate systems are not edge cases anymore. They leak into performance data, brand perception, and internal credibility. Marketing becomes harder not just because attention is scarce, but because the information environment itself is less trustworthy.

Put simply, the signals align because they are all downstream of the same shift.

- abundance creates noise
- volatility creates fragility
- mediation creates gatekeepers
- signal loss creates uncertainty
- complexity creates a coordination tax
- trust decay creates a credibility crisis
- diminishing returns create pressure and scrutiny

That is why the lived experience inside the function feels like this. More effort, more stress, more justification, less clarity, less confidence.

## 6.2 The unifying thesis sentence (the snap)

Here is the snap.

**Marketing is still being run with an operating model built for a world of stable scarcity, but it now operates in a world of volatile abundance. So inputs rise, visibility falls, and marginal impact decays.**

That is the mismatch.

The old model assumes you can buy reach at predictable rates, track performance with reasonable confidence, scale output to scale results, treat channels as controllable pipes, and separate marketing from the rest of the growth system.

The new environment increasingly behaves as if attention is the scarce resource, not content. Distribution is mediated and rented. Measurement is partial and model-driven. Creative decays faster and looks more similar. Growth is cross-functional by default.

When you try to run old assumptions inside the new conditions, the result is not a small performance wobble. It is structural strain.

## 6.3 What the thesis explains

A good thesis should not just sound right. It should explain why the symptoms are showing up together.

If the mismatch thesis is true, it explains the following.

## **1) Why marketing feels permanently under scrutiny even when teams are working hard.**

In a declining-signal world, performance becomes harder to prove. When proof gets harder, scrutiny rises. The function becomes a natural target because it is visible spend, visible output, and imperfect measurement.

## **2) Why budgets flatten while expectations rise.**

Flat budget as a percentage of revenue might look neutral on paper, but in a tougher environment it functions like a cut. The work required to produce the same outcome increases, and the resource share does not.

## **3) Why reporting expands and strategy shrinks.**

When confidence drops, organisations compensate by asking for more proof. That expands dashboards, cadences, post-mortems, channel reports, often at the expense of the actual strategic work that would improve outcomes.

## **4) Why attribution debates become emotionally charged.**

Attribution is not just a technical argument in this environment. It becomes a proxy war for control, credibility, and budget protection. When measurement is inherently uncertain, whoever can tell the most convincing story often wins.

## **5) Why martech stacks balloon but utilisation stays low.**

In uncertain environments, teams buy tools as a way to regain control. But the coordination tax of implementing and using them rises, and the signal improvements often do not match the promise. Complexity grows and capability lags.

## **6) Why performance marketing starts to eat brand building, and then weakens itself.**

Under pressure and scrutiny, spend shifts toward what looks measurable this quarter. Over time, that depletes the upstream brand and demand conditions that make performance efficient. It is a self-reinforcing loop.

## **7) Why creative becomes both more important and more neglected.**

In a high-noise world, creative distinctiveness is the lever. But when teams are squeezed, creative becomes templated, rushed, and overloaded with messages. That is exactly the opposite of what works.

## **8) Why internal friction rises and marketing feels less autonomous.**

Because growth levers sit across product, pricing, proposition, ops, sales enablement, customer experience, and retention, marketing cannot own outcomes alone. The organisation still wants a single throat to choke, so marketing absorbs blame without full control.

## **9) Why trust problems hit both performance and credibility.**

When the information environment is contaminated through fraud, fake reviews, bots, and synthetic content, teams lose confidence in their own data and leaders lose confidence in what they are being told. Marketing's legitimacy suffers.

If you have felt any of those dynamics, the thesis is not abstract. It is already in your week.

### **Mini-scene: the plan becomes a defence document.**

You start the year thinking about customers and growth. Then the signal gets messy, a few channels wobble, and suddenly the energy changes. The deck stops being a plan. It becomes a justification. You spend more time explaining why results are uncertain than improving the conditions that drive them.

## **6.4 What the thesis predicts (so it can be tested)**

A thesis earns its keep by predicting what we should see next.

If marketing is operating with an old model inside a new environment, we should expect the following.

### **1) More modelling, less determinism.**

Not because marketers suddenly love models, but because deterministic attribution cannot carry the weight. Triangulation through experiments, marketing mix modelling, incrementality, and qualitative insight becomes normal. Organisations that cannot tolerate uncertainty will get stuck.

### **2) More answer-layer gatekeeping and fewer clean clicks.**

Assistants, AI summaries, and platform-native experiences will increasingly intercept intent. Brands will have to fight for presence, meaning being the cited source, the recommended option, the remembered choice, not just the click.

### **3) A continued rise in the coordination tax.**

More cross-functional governance, more brand safety and integrity controls, more privacy compliance, more tooling, more stakeholder complexity, unless companies simplify aggressively.

### **4) Faster creative decay and higher sameness.**

As AI increases the supply of decent but generic creative, the baseline will get noisier. The advantage will concentrate in distinctive assets, taste, positioning, and the ability to produce non-generic creative that actually carries meaning.

## **5) More fraud, more verification, more trust infrastructure.**

The incentives point in one direction. Manipulation will rise until systems adapt. Brands will need stronger verification, stricter measurement hygiene, and trust-building mechanisms that go beyond we say we are good.

## **6) Greater concentration of demand capture into a few gatekeepers.**

Retail media, marketplaces, major ad platforms, and walled ecosystems will keep absorbing budget because they are where the rails are. That will further pressure margins and force sharper strategy upstream.

## **7) More polarisation in outcomes.**

Teams that learn to operate under uncertainty, build durable brand assets, and align cross-functionally will outperform. Teams that keep chasing certainty, over-optimising short-term metrics, and scaling generic output will feel like they are running uphill forever.

These predictions are not just what might happen. They are the natural extension of the conditions already visible in the 30 signals.

# **6.5 What this means**

If this meta-diagnosis is right, then the conclusion is uncomfortable but clarifying.

The solution is not do more marketing. It is operate differently.

Not a channel tweak. Not a new dashboard. Not a new tool.

A shift in how you build advantage, through distinctiveness and trust. A shift in how you measure, through triangulation and humility. A shift in how you distribute, through presence across mediated rails. A shift in how you organise, through cross-functional growth systems. A shift in how you allocate effort, through fewer bets, higher quality, and a longer horizon where it matters.

That is what the rest of this report intends to do. Translate a structural diagnosis into strategic shifts you can actually run inside a real company, without pretending the old world is coming back.

## 7.0 Inside the Modern Marketing Function (2026 Reality)

Before we get any more analytical, it's worth translating the evidence into something more human. The research we've covered so far points to a marketing environment defined by weaker signals, rising complexity, higher scrutiny, faster creative decay, and a widening gap between what leadership wants, which is certainty, and what the system can reliably provide, which is probabilities. If that's true, the impact won't just show up in charts and benchmarks. It will show up inside organisations as behaviour. More politics, more defensive reporting, more KPI sprawl, more mistrust, more burnout, and a strange new pressure where AI increases output faster than it increases confidence. So, here's a fictional story. Not because it's made up, but because it's a composite. A week that could be happening in thousands of marketing teams right now.

### 7.1 A week in the life of "Marketing"

On Monday morning, you open your laptop and feel the familiar micro-flinch. The calendar is already full.

Not busy. Full. Like a suitcase you couldn't zip, even if you sat on it.

The first meeting starts in seven minutes. You don't remember accepting it, but you did. You always do, because everything feels important now. Everything has a number attached to it, and every number has someone asking why it moved.

You take a sip of coffee. Your inbox refreshes. A new message from Finance lands at the top.

**Subject:** "Quick question – what drove the revenue lift last week?"

You stare at it for a second too long.

Not because you don't have an answer.

Because you have twelve.

And none of them are clean.

#### **Monday: The Credibility Room**

At 9:00, you're in the weekly performance meeting. It's not called that, but that's what it is. The agenda is two bullets long:

- Pipeline
- Marketing update

Pipeline takes forty minutes. Marketing gets ten.

You don't take it personally. That's not the game anymore. You've learned the game. Ten minutes isn't ten minutes. Ten minutes is a negotiation. Ten minutes is a test.

The room is full of people who didn't used to come to marketing meetings.

Sales Ops. Product. Customer Success. The new RevOps hire. Someone from Data. Your CEO, who's usually too busy for this, but now likes to "stay close to performance."

And Finance. Always Finance.

When it's your turn, you put up the slide everyone expects. A clean chart with a clean line.

You've spent two hours making it clean.

Then you start speaking, and the caveats arrive immediately, like rain.

"Organic is up, but branded search is doing some heavy lifting, and..."

"Conversion's flat week-on-week, but AOV is up, and..."

"Paid performance improved, but that's partly because we tightened targeting after the CPC spike, and..."

"The nurture sequence is contributing, but it's multi-touch, and..."

You hear yourself, and you can feel it. The room drifting.

Not because they're hostile.

Because uncertainty is expensive now. Everyone's carrying too much of it already. People want the cheapest story.

Then Sales speaks.

They don't have a chart. They have a narrative.

"Pipeline rose because the team pushed the accounts we've been sitting on. We did more follow-up, and the new pitch deck helped."

It isn't false. It's just simpler.

The CEO nods. Finance smiles. Someone says, "Great. So marketing's working then?"

You know what they mean.

They mean, we need a reason to keep funding this.

You say something safe.

“Yes. And we’re seeing leading indicators improving, but we need to keep consistent spend to sustain the trajectory.”

A silence.

Then Finance: “Okay. But what’s the ROI of the last campaign?”

You feel your shoulders tighten.

You could answer honestly.

You could say we don’t have clean causal proof because the system doesn’t allow it anymore. You could say everything overlaps, everything leaks, everything lags. You could say the world used to be measurable in straight lines, and now it’s measurable in fog.

But you don’t.

Instead you do what modern marketing teaches you to do.

You translate fog into confidence.

You pull up the attribution model. You show the numbers with a careful voice, like you’re carrying a tray of glasses through a crowded room.

And while you’re talking, you can feel the real thing happening underneath.

This isn’t about ROI.

This is about status.

It’s about who gets to tell the story of why the company is winning or losing.

It’s about which function looks like the engine, and which function looks like the cost.

And it’s about whether your credibility can survive another quarter of maybe.

## **Tuesday: The KPI Maze**

On Tuesday, you have a 1:1 with your team.

Half the time is spent not talking about work, but talking about the shape of work. What’s asked for, what’s measured, what’s suddenly urgent, what’s quietly dying.

Your brand lead says, “I don’t know what success is anymore.”

Your search manager says, "I can improve ROAS, but if demand is down, I still lose."

Your content person says, "We published five pieces last week and the engagement was... fine. But everything looks the same out there now."

Everyone's working. Everyone's competent. Nobody feels like they're winning.

After the 1:1 you open the dashboard.

It has grown again.

It always grows.

A new metric appears because someone asked a new question, and the easiest way to answer it is to add another column, another chart, another weekly meeting.

This is how measurement becomes management theatre. Not through malice, but through fear.

You scroll.

Traffic.

Conversion rate.

AOV.

CAC.

Payback.

Pipeline influenced.

Pipeline sourced.

MQLs.

SQLs.

Email engagement.

Organic impressions.

Share of search.

Brand sentiment.

Time on site.

Return visitor rate.

LTV.

Retention cohort.

NPS.

Review velocity.

Sales cycle length.

Win rate by segment.

Revenue per account.

Somewhere inside all of it is reality.

But the system doesn't reward reality. The system rewards readiness. The ability to respond instantly when someone asks why a number moved.

So you spend your day building readiness.

You write notes for the meeting you already had. You pre-answer questions that haven't been asked yet. You create a narrative spine for the next performance call, with contingencies.

If X happens, we say Y.

If Y happens, we say Z.

If nothing happens, we say momentum.

And at some point mid-afternoon you realise you haven't done any strategy. You've done protection.

That's what marketing has become inside the building. A function that produces work, but also produces defence.

Defence against scrutiny.

Defence against randomness.

Defence against the perception that you're guessing.

Even when everyone is guessing.

## **Wednesday: Burnout and Mistrust**

Wednesday is the day the pressure shows.

A stakeholder pings: "Can you just quickly pull together a revised plan for Q2 with updated projections?"

Quickly.

It's always quickly now, because leadership's sense of time has changed. The environment moves faster, so the internal machine tries to move faster, too. But it moves with friction.

You think, I can do that.

Then you remember you're already doing three versions of the plan.

The Finance plan.

The Board plan.

The actual execution plan.

The real plan is the one in people's heads. The compromises, the constraints, the quiet knowledge of what will and won't work. But nobody wants that written down, because written down becomes accountable.

So you build another slide deck.

In the afternoon, there's a conversation with Sales that feels like it's about handover, but it isn't.

It's about trust.

They say marketing leads are lower quality.

You say the market is colder.

They say the market isn't the problem.

You say follow-up times are slow.

They say marketing doesn't understand the customer.

You say you've built three personas and two journey maps.

They say the leads still aren't good.

You both have evidence. Neither of you has certainty. So you argue over what you can control, your stories.

Afterward, you walk back to your desk and you notice your own behaviour.

You're less bold than you used to be.

You propose fewer creative leaps. You pick safer campaigns. You over-index on things you can report. You plan around what will survive the next meeting, not what will build the business.

That's the hidden cost.

Not the spend.

The shrinking.

The subtle behavioural shift where marketing stops acting like a growth function and starts acting like an audit function.

Because when trust erodes, everybody becomes a bureaucrat.

Even the creatives.

Even the builders.

Even you.

### **Thursday: AI and the Expectation Trap**

Thursday is AI day.

Not officially. But everything is AI day now.

You have a session with the CEO and a couple of directors. Someone has seen a demo, somewhere. A tool generating campaign concepts in seconds, a deck created from a prompt, a competitor analysis in a minute.

And the meeting has one unspoken question:

If AI makes marketing faster, why do we still feel behind?

Your team has been using AI for months. It absolutely helps.

Subject lines, variants, drafts, first passes, outlines, summaries, briefs, iterations.

Throughput is up. The team ships more.

But something else rises with it.

Expectations.

The CEO says, "So we can double output then?"

Finance says, "So CAC should come down, right?"

Someone else says, "So why don't we just test more? We can run everything now."

And you can. Sort of.

But you also know what AI doesn't fix:

It doesn't create clean signal in a noisy market.

It doesn't make measurement magically causal again.

It doesn't solve cross-functional dependencies.

It doesn't guarantee quality, differentiation, or truth.

It doesn't shorten legal review.

It doesn't stop brand decay.

It doesn't stop audiences from scrolling past sameness.

AI speeds up production, but production wasn't the bottleneck you were dying from.

The bottleneck was clarity.

And now the trap closes.

Because the business sees speed, it assumes certainty should follow.

If you can create five landing pages in a day, surely you can prove which one works.

If you can write fifty ads, surely one will outperform.

If you can generate ten strategies, surely one is right.

But certainty doesn't scale like output.

Often, it scales slower.

Because the more you produce, the more you must evaluate.

The more you test, the more you must interpret.

The more you ship, the more you must coordinate.

The more you measure, the more you must explain.

So the machine accelerates, and the human cost rises.

Your team starts to feel like they're feeding a furnace.

And the furnace is never full.

### **Friday: The Private Moment**

By Friday afternoon, you have ten tabs open and none of them contain the answer to the original Finance email.

You could reply with your best narrative.

You could cite the channels that "contributed." You could attach an attribution report. You could say something like multi-factorial and hope that sounds sophisticated enough to be trusted.

Instead, you pause.

You look at your week.

What you did:

defended your function's credibility

navigated a KPI maze

managed political risk

soothed mistrust

shipped work

adopted AI

explained uncertainty like it was a choice

And you realise the real truth is simpler than any dashboard.

Marketing hasn't become harder because marketers got worse.

Marketing has become harder because the environment changed faster than the internal operating model did.

The company still wants marketing to behave like a controllable machine.

But marketing now behaves like a complex system.

And inside complex systems, what rises isn't just chaos.

It's politics.

Because when proof is scarce, power fills the gap.

That's why the meetings feel different.

That's why the work feels heavier.

That's why the team feels burned out even when output is up.

That's why AI feels like a miracle and a threat at the same time.

You close the laptop.

The week ends.

The machine keeps moving.

And you already know what Monday's question will be.

### **Did this resonate?**

If any of this felt uncomfortably familiar, the constant demand for clean explanations, the dashboard that grows while clarity shrinks, the meetings that quietly become credibility trials, the defensive behaviour that creeps in as trust erodes, and the sense that AI is raising expectations faster than it's resolving uncertainty, then it's worth asking a final question. Are we looking at a few local problems inside your business, or are we watching what happens when an old marketing operating model is forced to survive inside a new environment?

## 8.0 Root Causes

The last section described what modern marketing feels like inside organisations: constant pressure, confidence collapse, KPI maze, “prove it” demands, and the sense that the old levers don’t pull like they used to.

This section is the compression step: 3-5 structural forces that can explain most of the signals at once. Not trends. Not tactics. The underlying physics.

### Root cause 1: Incentives + time horizons

Marketing didn’t become short-term because marketers suddenly got impatient. It became short-term because business incentives reward short-term outcomes and punish anything that looks like a cost without immediate proof.

One clean piece of evidence: research using monthly advertising spend found managers adjust, often reduce, advertising to help hit quarterly earnings benchmarks. In other words, marketing becomes a lever in earnings management.<sup>65</sup>

That cascades through the marketing operating model:

- Planning horizons collapse. Long-run programmes, brand, positioning, distribution building, struggle to survive a quarterly world.
- Defensibility beats truth. The “best” choice internally becomes the one that can be justified in a meeting, not the one most likely to work over 12–24 months.
- Brand becomes optional. The organisation treats brand as a discretionary spend rather than a compounding asset.

Marketing bodies have been warning about this drift for years, because it creates long-term damage while looking rational in the short term.<sup>66</sup>

**AI as amplifier:** When AI speeds up content production, testing and iteration, it also speeds up expectations. If you can ship 10 variants a day, people start asking why you didn’t. That accelerates the performative productivity loop and pushes time horizons even shorter.

### Root cause 2: Platform economics / distribution dependence

A big chunk of modern marketing is done on infrastructure you don’t own: search engines, social feeds, marketplaces, app ecosystems. That’s not just a channel mix choice. It’s a structural dependence.

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<sup>65</sup> *Cohen, Daniel; Mashruwala, Raj; and Zach, Tzachi, “The Use of Advertising Activities to Meet Earnings Benchmarks: Evidence from Monthly Data” (working paper, 2007), PDF*

<sup>66</sup> *Institute of Practitioners in Advertising (IPA), “The Long and the Short of It: Balancing Short and Long-Term Marketing Strategies” (Les Binet and Peter Field, 2013)*

The UK Competition & Markets Authority's market study on online platforms and digital advertising describes how competition isn't working well in these markets and points toward structural issues and platform power.<sup>67</sup>

Why this matters for marketers:

- Rules are externalised. Your growth can be re-priced overnight by algorithm shifts, auction dynamics, or policy changes.
- Switching is costly. Even when performance worsens, moving away is hard, capability, creative norms, data access, organisational habit.
- The gatekeepers own the map. Platforms control reach, targeting, formats, and often the measurement story too.

This isn't accidental. Platform businesses are designed to create and monetise interactions across multiple sides of a market, and network effects can entrench power after tipping points.<sup>68</sup>

**AI as amplifier:** Gatekeepers now increasingly include AI-mediated discovery, assistants, AI answers, citation layers. Brand and visibility can drift as models retrain and summarise the world in their own way, creating a new kind of distribution volatility.<sup>69</sup>

### **Root cause 3: Measurement constraints and "proof demand"**

The industry is being squeezed from both sides:

- Observability is falling, privacy changes, cookie deprecation, weaker identity signals.
- Proof demand is rising, finance scrutiny, tighter budgets, greater accountability.

Attribution providers have been explicit about the first half: deterministic tracking is harder under privacy restrictions like Apple's App Tracking Transparency, reducing the ability to see the full journey.<sup>70</sup>

At the same time, platform attribution has unavoidable structural limitations: it's siloed, one platform sees one slice, shaped by incentives, and eroded by privacy changes.<sup>71</sup>

The organisational consequence is predictable:

- Attribution theatre. People act like the model is the truth because a number is required for the spreadsheet.

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<sup>67</sup> *UK Competition and Markets Authority (CMA), Online platforms and digital advertising: Market study final report (Final report, July 1, 2020)*

<sup>68</sup> *Evans, David S., Platform Economics: Essays on Multi-Sided Businesses (collected essays, 2011), PDF*

<sup>69</sup> *Koene, Jordan, "Why LLM perception drift will be 2026's key SEO metric," Search Engine Land, December 8, 2025*

<sup>70</sup> *Funnel, "Deterministic vs. probabilistic attribution" (includes discussion of Apple's App Tracking Transparency and privacy impacts on attribution), Funnel Blog, October 24, 2024*

<sup>71</sup> *Hyman, Gretchen, "Meta Platform Attribution: Pros, Cons & Limitations," Measured (FAQ / Learning Center), November 17, 2025*

- False precision wins. The metrics you can present cleanly beat the messy reality you can't.
- Short-term bias intensifies. If you can't measure long-term effects confidently, they become politically risky.

This is part of why industry bodies have put effort into describing how complex measurement has become in the digital economy.<sup>72</sup>

In response, marketers are increasingly pulled back toward econometrics and MMM approaches that work under weaker user-level visibility. Meta's Robyn project, for example, explicitly models carryover and diminishing returns and saturation curves as core features, essentially treating marketing as a probabilistic system rather than a perfectly trackable one.<sup>73</sup>

**AI as amplifier:** As AI increases output volume and channel complexity, it increases the number of touchpoints and content variants that could be responsible for outcomes. That makes simple causal stories even harder, right when the organisation wants cleaner proof.

#### Root cause 4: Saturation and diminishing returns

Even if measurement were perfect, marketing would still feel harder because many categories are now crowded, copycat, and over-supplied. When everyone scales the same playbooks, returns flatten.

Thinkbox summarises it plainly: increased advertising spend follows a diminishing returns curve, each extra pound tends to generate slightly less than the previous pound.<sup>74</sup>

Robyn treats that same dynamic as a modelling assumption: channels saturate, response curves flatten, and incrementality declines as spend rises.<sup>75</sup>

In the marketing function, diminishing returns shows up as:

- constant creative refresh pressure
- CAC creep and efficiency decay
- channel hopping, not because it's smart, but because the current curve is flattening
- a rising baseline of spend required just to stand still

**AI as amplifier:** abundance becomes a supply shock. When content becomes cheaper to produce, more of it exists, and the noise floor rises. Public discourse is increasingly aware of low-quality AI output flooding platforms.<sup>76</sup>

<sup>72</sup> Interactive Advertising Bureau (IAB), *Measuring the Digital Economy (report, April 29, 2025)*, PDF

<sup>73</sup> Meta (Facebook Experimental), "Robyn Documentation: Key Features" (includes saturation and diminishing returns response curves), Robyn Documentation

<sup>74</sup> Thinkbox, "The drivers of profitability" (includes discussion of advertising effectiveness and diminishing returns), Thinkbox

<sup>75</sup> Meta (Facebook Experimental), "Robyn Documentation: Key Features" (includes saturation and diminishing returns response curves), Robyn Documentation

<sup>76</sup> Mahdawi, Arwa, "AI-generated 'slop' is slowly killing the internet (and we're all complicit)," *The Guardian*, January 8, 2025

Meanwhile, academic work is actively modelling the finite lifespan of creative effectiveness, creative fatigue, and methods to detect performance decay in digital advertising.<sup>77</sup>

### **The compression: one sentence that links the four forces**

Put together, the system looks like this:

Short-term incentives push marketers toward what can be proven now; platform dependence concentrates power in external gatekeepers; measurement gets weaker just as proof demands rise; and saturation flattens returns, while AI accelerates the entire cycle by increasing output, sameness, and volatility.

This set of forces doesn't just explain the present. It predicts what comes next: more internal mistrust, more performative measurement, more output inflation, and more channel churn as teams search for fresh curves.

And that's the bridge to the next section: when organisations face these forces, they adopt predictable failure modes.

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<sup>77</sup> **Shaw, C.**, "A Path Signature Framework for Detecting Creative Fatigue in Digital Advertising," arXiv (preprint), 2025

## 9.0 Failure Modes

When marketing gets harder to observe and predict, organisations do not calmly accept uncertainty. They react.

They react the same way most systems do under pressure. They try to restore control. They ask for cleaner attribution. They demand faster proof. They move budget around more often. They ship more output. They buy more tools. They retreat into the channels that report neatly. They refresh the brand as a symbolic reset.

These moves are understandable. They are also the reason performance often gets worse right at the moment leadership starts paying the most attention.

What follows are the common failure modes, what they look like, why they feel rational, and why they backfire.

### 9.1 How organisations respond, and why it backfires

Most of these failure modes share the same shape:

- Signal gets weaker (privacy constraints, platform opacity, fragmented journeys, more noise).
- Pressure rises (growth targets do not move, scrutiny increases, trust declines).
- The organisation tries to reduce uncertainty with actions that look decisive and measurable.
- The system becomes more complex and less learnable, which reduces signal further.

This is the loop. Each response makes the environment feel even less controllable, which triggers an even stronger response next quarter.

### 9.2 Attribution theatre

#### What it looks like

Dashboards multiply. Reporting cadences tighten. Models get more sophisticated. Language gets more confident. You hear phrases like “we know this channel drove X,” even when the underlying data is stitched together from partial views, assumptions, and proxy signals.

Attribution becomes less about learning and more about defending budget, appeasing leadership, and appearing in control.

#### Why it feels rational

In a high scrutiny environment, numbers are protection. If you can “prove” contribution, you can justify spend. If you can justify spend, you can avoid cuts and political fallout.

#### Why it backfires

Attribution theatre changes what teams optimise for. They start optimising for what the model can see, not what actually drives growth. That usually means over-crediting lower funnel activity and under-investing in the messy upstream drivers of demand.

It also increases internal conflict, because attribution becomes a power system. Budget ownership follows reported performance, so teams fight to win the model, not the market.

A more mature stance is to treat attribution as one input alongside incrementality testing and longer horizon modelling, because each method answers a different question.<sup>78 79</sup>

## 9.3 Channel chasing

### What it looks like

A channel underperforms, so the organisation shifts spend into the next thing. Retail media. Creators. A new social platform. A different ad product. A new content format. The storyline is always the same: “We need to be there,” or “This is where the audience is going.”

The surface area of activity expands, but nothing compounds. The organisation becomes permanently mid-flight, always learning the basics again.

### Why it feels rational

When returns flatten, you look for a fresh curve. Switching channels feels like action. It creates hope and a narrative leaders can repeat.

### Why it backfires

Channel chasing resets learning. Every channel has its own creative logic, audience norms, feedback loops, and measurement quirks. If you leave before you develop fit, you never reach the part where results compound.

You also fragment attention and resources, which makes it harder to become distinctive anywhere. The organisation ends up present in many places but memorable in none.

## 9.4 Output inflation, now turbocharged by AI

### What it looks like

The content calendar swells. Campaign volumes increase. Variants multiply. Testing becomes relentless. AI turns output into the easiest lever to pull, because it makes production faster and cheaper.

The team starts shipping more, but learning less.

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<sup>78</sup> *Adjust*, “How attribution, incrementality, and MMM interact,” *Adjust Blog*

<sup>79</sup> *Measured*, “What’s the Difference Between Attribution vs. Incrementality?” *Measured (Learning Center)*

## Why it feels rational

When the system becomes harder to read, volume feels like a way to brute-force signal. If one campaign does not work, ship five more. If engagement drops, publish more frequently. If conversion stalls, test more variations.

## Why it backfires

Abundance raises the noise floor. If everyone can produce more content, then the marginal unit of content becomes less valuable. Mark Schaefer's "content shock" framing captured the economics of this dynamic long before generative AI accelerated supply.<sup>80</sup>

Now, the cultural reality of low-quality, machine-generated content is visible at scale, including in algorithmic recommendation systems.<sup>81</sup>

Output inflation also creates evaluation overload. When you run too many campaigns at once, you struggle to isolate what worked, why it worked, and what to repeat. The result is movement without progress.

# 9.5 Martech bloat

## What it looks like

Tools stack up. Platforms overlap. Integrations become fragile. Workflows fragment. Teams spend more time operating the system than doing marketing.

The stack grows, but utilisation stays low.

## Why it feels rational

Buying tools feels like buying control. Tools promise better targeting, better automation, better personalisation, better measurement. They also create a strong internal story: "We are investing in capability."

## Why it backfires

Complexity is not free. It becomes a coordination tax that compounds. It slows execution, increases governance load, and creates hidden dependency chains.

The utilisation issue is not hypothetical. Gartner reported martech utilisation dropping to 49% in its 2025 Marketing Technology Survey, implying many organisations are carrying cost and complexity without capturing the value.<sup>82</sup>

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<sup>80</sup> Schaefer, Mark W., "Content Shock: Why content marketing is not a sustainable strategy," {grow} (businessgrow.com), January 6, 2014

<sup>81</sup> Hern, Alex, "More than 20% of videos shown to new YouTube users are 'AI slop', study finds," The Guardian, August 13, 2025

<sup>82</sup> Gartner, "Maximize ROI With Marketing Technology (Martech)" (notes the 2025 Gartner Marketing Technology Survey finding that martech utilization has dropped to 49%), Gartner (Marketing Technology topic page)

## 9.6 Performance-only tunnel vision

### What it looks like

Short term efficiency metrics become the steering wheel. CAC, ROAS, pipeline, and attributed revenue dominate decision-making. Brand activity becomes politically fragile because it is harder to “prove” quarter by quarter.

When budgets tighten, anything that does not show immediate return gets cut first.

### Why it feels rational

Leaders want accountability. Marketers want protection. In many organisations, performance metrics are the only language that reliably survives scrutiny.

### Why it backfires

Performance works best when demand is healthy. If you starve the upstream drivers of preference and attention, performance becomes more expensive and less reliable over time.

This shift is visible in budget allocation data. The CMO Survey and WARC reporting on it show marketers moving more budget toward short term performance and away from brand building, even as many state a more balanced mix is ideal.<sup>83 84 85</sup>

The tunnel vision failure mode is not that performance marketing is wrong. It is that a single horizon operating model makes the business brittle.

## 9.7 Rebrands as resets (Jaguar)

### What it looks like

A new visual identity. A new tagline. A high-gloss launch film. A big internal reveal. A wave of PR. Often, a burst of energy inside the organisation that feels like momentum.

But the underlying drivers of customer experience and demand remain largely unchanged. The proposition is still fuzzy. The product story is still unclear. Distribution, service, pricing, and trust constraints are still there. The operating system is still misfiring.

So the rebrand becomes a symbolic reset that tries to stand in for a structural fix.

### Why it feels rational

A rebrand is a legible “big move.” It is bounded, project-shaped, and easy to rally people around. It gives leadership a story they can repeat externally and internally. It can also function

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<sup>83</sup> *The CMO Survey, Highlights and Insights Report: Fall 2024 (report, November 2024)*

<sup>84</sup> *The CMO Survey, Topline Report: Fall 2024 (report, September 2024)*

<sup>85</sup> *WARC, “Performance budgets rise at expense of brand” (based on The CMO Survey by Deloitte, Duke University’s Fuqua School of Business, and the American Marketing Association), WARC (The Feed), November 29, 2024*

as a public marker of change during strategic transitions, such as a shift to a new market position or to an electric future.

That is exactly how Jaguar framed its recent brand reset, positioning it as bold and disruptive while it prepares for a new electric era.<sup>86</sup>

### **Why it backfires**

When identity moves faster than reality, the gap becomes visible. A rebrand can trigger backlash if it feels untethered from what people think the brand is, what the product actually delivers, or what the customer expects to see.

Jaguar's campaign attracted intense reaction and criticism, including commentary that the work felt disconnected from product and legacy meaning, and that it created confusion at a moment when clarity was strategically important.<sup>87 88 89</sup>

The deeper point is not "rebrands are bad." It is that rebrands are often used to manufacture a sense of renewal when what is actually required is system repair.

## **9.8 What to take from this**

These failure modes are not random mistakes. They are predictable responses to pressure in a harder-to-measure, higher-noise environment.

If the diagnosis is structural, the implication is uncomfortable: you cannot dashboard your way out. You cannot tool your way out. You cannot volume your way out. You cannot pivot your way out. You have to change the operating model.

That is the handoff into what comes next in the report: what a resilient strategy looks like when the system is volatile and partially observable.

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<sup>86</sup> *Donnelly, Dylan*, "Jaguar boss says 'we want to be bold and disruptive' after rebrand backlash, as new electric car revealed," *Sky News*, December 3, 2024

<sup>87</sup> *Abdul, Geneva*, "Jaguar boss defends new ad and rebrand amid 'vile hatred' online," *The Guardian*, November 23, 2024

<sup>88</sup> *Jolly, Jasper*, "Claws are out as Jaguar heads down EV rebrand road," *The Guardian*, December 1, 2024 (last modified March 6, 2025)

<sup>89</sup> *Jolly, Jasper*, "Jaguar boss says it has shown 'fearless creativity' with new electric car (Type 00)," *The Guardian*, December 3, 2024

# 10.0 What Still Works (Evidence-Backed Principles)

After Section 9, it is tempting to conclude that marketing is broken beyond repair. But that is not what the evidence says.

What the evidence suggests is simpler and more useful: the environment has changed faster than most marketing operating models. Attention is harder to earn, channels are less stable, and measurement signals are weaker. Yet the underlying mechanisms that make marketing work are still the same, because they are rooted in how humans notice, remember, and choose.

This section sets out the principles that still hold up, then makes a clean distinction between where AI genuinely helps and where it reliably misleads.

## Principle 1: Brands still grow through availability, not persuasion

Across categories, the strongest and most repeatable explanation for brand growth is not superior persuasion. It is being easy to think of and easy to buy.<sup>90 91</sup>

That is usually described as:

- **Mental availability:** buyers can quickly recall or recognise the brand in relevant buying situations.
- **Physical availability:** buyers can easily find, buy, and use the brand.

These ideas are sometimes treated like “brand theory”. They are more like a practical model of demand. In high-noise conditions, mental availability becomes more valuable, because it reduces the cognitive cost of choosing. And in fragmented distribution, physical availability becomes more valuable, because friction kills conversion.

This is why the fundamentals survive the new conditions. Humans still use shortcuts. Humans still prefer the easy option. And most buying decisions still rely on memory and recognition far more than marketing teams would like to admit.

## Principle 2: Distinctive assets still matter, and they matter more when sameness rises

If marketing is becoming noisier, the key question is not “did we run enough content?” It is “did any of it clearly register as us?”

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<sup>90</sup> Ehrenberg-Bass Institute for Marketing Science, “How do you measure ‘How Brands Grow’?” Marketing Science ([marketingscience.info](http://marketingscience.info)) (News & Insights)

<sup>91</sup> WARC, “Physical and mental availability key to growth,” WARC (The Feed), January 31, 2024

Distinctive brand assets do that job. Logos, colours, characters, packaging cues, sonic identifiers, and consistent verbal patterns are not cosmetic. They are memory triggers.<sup>92 93 94</sup>

Two things matter most:

1. Uniqueness: the cue points to you, not the category.
2. Fame: the cue is widely known in the category.

The more content the world produces, the more “competent generic” becomes the default. AI accelerates that trend. When the baseline quality rises but the baseline sameness rises even faster, distinctiveness becomes a competitive input.

This is a strategic reason to invest in assets and consistency. It is not nostalgia. It is how your communications avoid being absorbed into the category background.

### **Principle 3: The long and short portfolio still wins, but it requires explicit governance**

The evidence base on effectiveness repeatedly lands in the same place: long-term brand building and short-term activation both matter, and they behave differently.<sup>95 96 97</sup>

Short-term activity tends to convert existing demand. Long-term activity tends to create future demand by building memory, recognition, and predisposition. When teams over-optimize for short-term metrics, they can generate results that look “efficient” today while undermining growth tomorrow.

Binet and Field’s work popularised the long/short balance as a planning heuristic. The exact ratio varies by category, competitiveness, and brand maturity, but the portfolio logic remains intact: you need both time horizons working together.<sup>98</sup>

WARC’s synthesis work reinforces the same building blocks: invest for growth, balance spend across horizons, and prioritise creative quality and recognition.

In 2026 conditions, the principle still holds. What changes is the operating model around it. Teams need clearer horizon ownership, fewer incentives for attribution theatre, and a decision cadence that protects long-term work from short-term panic.

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<sup>92</sup> *Fiocchi, G., and Mona Seyed Esfahani, “Exploring the uniqueness of distinctive brand assets within the UK automotive industry,” Journal of Brand Management 31, no. 1 (2024): 1–15*

<sup>93</sup> *Ipsos, The Power of You: How distinctive brand assets can help build brands (Ipsos Views, PDF)*

<sup>94</sup> *Romaniuk, Jenni, Building Distinctive Brand Assets (Oxford: Oxford University Press, 2018)*

<sup>95</sup> *Binet, Les, and Peter Field, The Long and the Short of It: Balancing Short and Long-Term Marketing Strategies (IPA Effectiveness Awards, presentation deck, PDF, 2013)*

<sup>96</sup> *WARC, “Anatomy of effectiveness: A white paper by WARC,” WARC (WARC Exclusive)*

<sup>97</sup> *WARC, “The Anatomy of Effectiveness: 2022 Updated Edition,” WARC (WARC Exclusive), June 2022*

<sup>98</sup> *Binet, Les, and Peter Field, The Long and the Short of It: Balancing Short and Long-Term Marketing Strategies (IPA, 2013), PDF (System1-hosted copy)*

## **Principle 4: Share of voice still has value, but it is not a substitute for attention and creativity**

Excess share of voice has long been used as a way to think about market share growth. It is still a useful budgeting lens, particularly in established categories where paid media is a primary driver of salience and reach.<sup>99 100 101</sup>

But the ESOV story is being challenged and refined. When media consumption patterns change and channels fragment, “spend share” is less reliably equivalent to “attention share”. There is also a practical risk that teams treat ESOV as the answer, rather than as one input.

The modern version of the principle is:

- Investment matters.
- Relative investment can matter.
- But outcomes depend heavily on creative quality, recognition, and how much attention you actually earn.

IPA commentary explicitly points to the need to revisit ESOV assumptions as behaviours shift.

WARC continues to summarise evidence linking ESOV and growth, typically alongside attention and effectiveness multipliers.

So ESOV belongs in Section 10, but as a calibrated principle: useful, not sacred.

## **Principle 5: Creative quality is still the biggest multiplier in the system**

When attention is abundant, average creative can limp along. When attention is scarce, average creative gets brutally expensive.

Across effectiveness syntheses, creative quality shows up as one of the strongest multipliers of paid outcomes. The point is not that every ad must be art. The point is that creative determines whether your spend buys attention and memory, or merely buys delivery.<sup>102 103</sup>

WARC’s evidence summaries repeatedly emphasise creativity, emotion, and distinctiveness as central drivers of effectiveness.

In the new regime, creative quality becomes even more valuable because the noise floor is higher and the decay cycle is faster. If you cannot earn attention, your targeting, bidding, and attribution sophistication will not save you.

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<sup>99</sup> **Pabari, Bhavin**, “ESOV: An excessive focus on the wrong thing?” *Institute of Practitioners in Advertising (IPA) Blog*, November 13, 2023

<sup>100</sup> **Farr, Felicity**, “Hard times call for hard decisions on share of voice,” *Institute of Practitioners in Advertising (IPA) Blog*, September 22, 2022

<sup>101</sup> **WARC**, “Growing market share: here’s what we know,” *WARC (The Feed)*, April 5, 2024

<sup>102</sup> **WARC**, “Anatomy of effectiveness: A white paper by WARC,” *WARC (WARC Exclusive)*

<sup>103</sup> **WARC**, “The Anatomy of Effectiveness: 2022 Updated Edition,” *WARC (WARC Exclusive)*, June 2022

## **Principle 6: Measurement that still works is causal where possible and triangulated everywhere else**

A core failure mode of the modern marketing function is treating weak measurement as if it were strong. If attribution is unreliable, the answer is not to demand more precision from broken instruments. The answer is to switch to a measurement posture designed for uncertainty.

The most defensible hierarchy looks like this:

- Causal methods where feasible: experiments, incrementality testing, geo tests, and other forms of controlled measurement.<sup>104</sup>
- Triangulation elsewhere: combining signals from multiple imperfect methods (including econometrics, brand tracking, platform lift studies, and qualitative insight) to make decisions without pretending any one metric is the truth.

Incrementality testing is widely discussed in the academic and applied analytics literature, including published work on experimental designs in programmatic environments.

This is how marketing remains accountable without becoming dishonest. The goal is not perfect certainty. The goal is better decision-making over time.

## **10.1 What changes is the operating model, not human psychology**

If you zoom out, the durable principles all share one theme: they rely on stable human behaviours.

Humans still:

- use memory and recognition to choose
- prefer familiar and easy options
- respond to emotion and story
- rely on cues to navigate complexity
- reduce cognitive load under pressure

The environment has changed. Human cognition has not.

That is why the next section of this report should focus on modern operating models and strategic shifts, not on reinventing the human.

### **AI in marketing: where it genuinely helps and where it reliably misleads**

AI is not a replacement for marketing fundamentals. It is an accelerant. Used well, it speeds up good practice. Used badly, it scales bad practice.

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<sup>104</sup> Barajas, Joel, and Narayan Bhamidipati, "Incrementality Testing in Programmatic Advertising: Enhanced Precision with Double-Blind Designs," Proceedings of The Web Conference 2021 (WWW '21), ACM, 2021

## 10.2 Where AI genuinely helps

### 1. Faster research and synthesis

AI can compress the time needed for first passes, summarisation, and structured analysis. This is especially valuable in strategy work, where the bottleneck is often getting from blank page to usable draft.

### 2. Iteration and production speed

AI can generate variants, explore angles, and help teams iterate more quickly. If you have good constraints, strong brand assets, and clear evaluation criteria, speed becomes a genuine advantage.

### 3. Workflow redesign opportunities

The organisations that get value from AI tend to go beyond experimenting with tools and instead redesign workflows and governance around them. McKinsey's survey work highlights both widespread adoption and the importance of management practices, including human validation processes for model outputs.<sup>105 106 107</sup>

## 10.3 Where AI misleads

### 1. False confidence from hallucinations

Generative systems can produce plausible outputs that are wrong. In professional settings, the danger is not just error. It is confident error that slips through because it reads well.

Nielsen Norman Group documents hallucinations as a known behaviour and frames it as a design and usage risk, not a rare edge case.<sup>108</sup>

### 2. Volume bias

AI makes it easy to produce more. That creates a seductive but destructive logic: if output is cheap, output becomes the goal. Teams can end up shipping more assets with less learning, less distinctiveness, and lower marginal impact.

### 3. Homogenisation and template gravity

Unless a brand has strong constraints and a real point of view, AI tends to pull language and creative toward the mean. The result is often "polished sameness", which worsens the very noise problem marketers are trying to solve.<sup>109</sup>

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<sup>105</sup> McKinsey & Company, "The state of AI in early 2024: Gen AI adoption spikes and starts to generate value," McKinsey (QuantumBlack Insights), May 30, 2024

<sup>106</sup> McKinsey & Company, "The State of AI: Global Survey 2025," McKinsey (QuantumBlack Insights)

<sup>107</sup> McKinsey & Company, The state of AI: How organizations are rewiring to capture value (Survey, March 12, 2025), PDF

<sup>108</sup> Laubheimer, Page, "AI Hallucinations: What Designers Need to Know," Nielsen Norman Group (NN/g), February 7, 2025

<sup>109</sup> Feuer, Wiebke, "AI Chatbots Discourage Error Checking," Nielsen Norman Group (NN/g), July 17, 2024

## 10.4 Practical Summary

What still works can be stated plainly:

- Build availability, not just persuasion.
- Invest in distinctive assets so your work registers as you.
- Balance long and short horizons with explicit governance.
- Treat ESOV as a lens, not a law, and pair it with attention and creative quality.
- Prioritise creative as a multiplier.
- Measure causally where you can, triangulate everywhere else.
- Use AI to speed up good practice, not to scale output theatre.

This creates the bridge you need into your strategic recommendations: not a reinvention of marketing, but a modern way to execute what has always worked inside radically changed conditions.

## 11.0 The Strategic Shifts Required Now

If the diagnosis in this report is right, then the answer is not to try harder inside the old playbook. The answer is to change the operating model.

The mismatch is simple: marketing is still being run with assumptions shaped by a world of stable scarcity, while the environment increasingly behaves like volatile abundance. That mismatch explains why effort rises while visibility falls, why teams produce more but feel less confident, and why marginal impact decays.

Section 10 makes the bridge clear. The fundamentals still work because human behaviour has not changed. People still rely on memory, recognition, emotion, cues, and cognitive shortcuts. What changed is the environment that these fundamentals now have to operate inside. That is why the next step is not reinventing marketing. It is modernising how marketing gets executed and governed.

What follows are the strategic shifts required now. They are written to be board-readable, but they are not slogans. Each one implies a specific change in how marketing is planned, evaluated, and integrated into the business.

### **Shift 1: From attribution certainty to decision-quality measurement**

In the old operating model, legitimacy increasingly became tied to attribution. If you could not prove what caused performance, you were expected to keep searching until you could. That expectation made sense during the high-water mark of observable tracking, when the system appeared more measurable than it really was. In the current regime, signals are weaker and journeys are more fragmented. The demand for certainty has not disappeared. In many organisations it has increased. The result is a credibility trap, and the temptation to compensate with attribution theatre.

The shift is to replace certainty with decision quality.

Decision-quality measurement is not about abandoning accountability. It is about upgrading what measurement is for. The point is to support better investment decisions under uncertainty, not to deliver courtroom-grade causality at all times.

This shift implies a measurement hierarchy. Causal methods where feasible, and triangulation everywhere else. The organisation does not pretend that any single dashboard is truth. It builds a learning system that combines experiments, incrementality, modelling, brand signals, and commercial judgement into a governance process that is honest about limits.

The board-level outcome of this shift is clarity. Leaders do not get false precision, but they do get a defensible answer to the only question that matters: what should we do more of, less of, or differently next quarter?

### **Shift 2: From content volume to distinctiveness, meaning, and taste**

When output becomes cheap, output stops being leverage. It becomes table stakes. In abundance conditions, the limiting factor is no longer production capacity. The limiting factor is

attention, memorability, and being recognised as you rather than absorbed into the background.

Section 10 explains why this is not a creative preference. It is a memory problem. Distinctive assets exist to make your work register as you. When sameness rises, those assets matter more, not less. When baseline quality rises but baseline sameness rises faster, distinctiveness becomes a competitive input.

The strategic shift is to treat meaning and taste as performance variables. That does not mean chasing art for art's sake. It means recognising that in a noisy system, generic work is expensive because it fails to earn attention and fails to generate memory. The risk is not low reach. The risk is paid invisibility.

This shift also clarifies AI's role. AI can increase speed, iteration and throughput, but it also accelerates homogenisation unless constraints are strong. The winners will not be the teams that can produce the most. They will be the teams with the clearest point of view and the strongest creative standards.

### **Shift 3: From channel excellence to distribution strategy**

In the old regime, channel expertise compounded. You could build competence on a platform and expect it to remain broadly relevant for long stretches. When the system is stable, optimisation is valuable. When the system is volatile, optimisation can become a trap.

The new regime behaves differently. Distribution is increasingly rented, mediated, and prone to sudden repricing. Discovery is shifting toward platform-native journeys and answer layers that can intercept intent. The relationship between marketing activity and customer action is less direct.

So the strategic move is to treat distribution as a portfolio and a plan, not as a channel list.

Distribution strategy answers questions that channel excellence cannot:

- Where do we have durable access versus rented access?
- Where can we build leverage that does not reset every time an algorithm shifts?
- How do we reduce dependency risk while still capturing demand efficiently?
- Which rails do we want to be on, and what does it cost to stay on them?

This shift does not reduce the importance of competence. It changes what competence is in service of. Instead of being excellent everywhere, the organisation becomes deliberately strong where it can win distribution over time.

### **Shift 4: From campaigns to compounding systems**

Campaigns still have a role, but they are a fragile unit of progress in a noisy, volatile system. They create activity, but they do not automatically create learning. They generate outputs, but they do not guarantee compounding. Under pressure, organisations often respond to declining returns by producing more campaigns, more variants, more tests, and more content. That can create movement without progress, especially when evaluation overload makes it hard to isolate what worked and why.

Compounding systems are the alternative.

A compounding system is built from assets and loops that improve over time:

- distinctive brand memory structures that accumulate recognition
- repeatable creative systems that get sharper with iteration
- durable demand channels that do not reset every quarter
- retention and advocacy loops that convert customers into distribution
- feedback cycles that improve decision-making rather than expanding reporting

This is the difference between a sequence of launches and a growth machine. It is also the difference between marketing that feels like constant reinvention and marketing that feels like increasing control.

### **Shift 5: From marketing as a function to marketing as an operating system**

A core theme of the diagnosis is that modern growth is cross-functional by default. Outcomes sit across product experience, pricing, sales enablement, distribution, customer success, trust infrastructure, and operational execution. The old mental model, marketing drives demand and sales converts it, maps less cleanly onto reality.

This is why marketing feels less autonomous and more scrutinised. It is accountable for outcomes it cannot fully control, while leaders still want a single place to assign responsibility.

The shift is to treat marketing as the operating system for growth under uncertainty.

That does not mean marketing does everyone else's job. It means marketing becomes the organiser of the growth system:

- clarifying the commercial narrative, positioning, and strategic choice
- aligning time horizons and incentives so long-term work survives short-term pressure
- coordinating cross-functional levers and ensuring feedback loops exist
- turning measurement into learning governance, not internal conflict

When marketing becomes an operating system, the job is less about shipping outputs and more about keeping the business oriented toward compounding advantage.

### **Shift 6: From rented reach to owned leverage and earned advantage**

Rented reach is not going away, but it is becoming less reliable as the default engine. Platform volatility, auction pressure, and mediation make paid growth feel increasingly like running on a treadmill that speeds up each quarter.

Owned leverage is the stabiliser.

Owned leverage includes direct relationships, audiences you can reach without paying a gatekeeper each time, partnerships that create privileged distribution, and ecosystems that make the brand easier to choose and easier to buy.

Earned advantage is the multiplier. In a high-noise, low-trust environment, trust and meaning become competitive. Brands that are source-worthy, recommendation-worthy, and remembered have a distribution edge that cannot be fully rented.

This shift is less about building a newsletter for the sake of it, and more about building strategic assets that reduce dependency and increase resilience.

### **Shift 7: From output metrics to a commercial narrative supported by credible proxies**

One reason marketing loses credibility is that the numbers become the story, and the numbers are often partial. Leaders ask what drove growth. Marketing provides charts with caveats. Someone else provides a simpler narrative. The organisation follows the cheapest story, not the truest one.

The shift is to lead with a commercial narrative and use proxies to support it.

A commercial narrative is a consistent explanation of:

- what the organisation is building in the market
- why it should compound
- where uncertainty remains
- what signals we expect to see next if we are right

Credible proxies are the small set of indicators that are honest enough to withstand scrutiny and useful enough to guide action. They replace the false confidence of single-source attribution with a balanced view of progress across time horizons.

This is how marketing becomes credible again. Not by claiming certainty, but by consistently linking strategic choices to observable signs of progress, and improving decision-making over time.

### **Closing bridge into the framework**

These shifts are not independent. They reinforce each other.

Decision-quality measurement reduces attribution theatre and frees time for strategy. Distinctiveness increases the return on distribution. Distribution strategy reduces dependency and improves resilience. Compounding systems create progress that does not reset each quarter. Marketing as an operating system aligns the business around the levers that actually drive growth. Owned leverage reduces the fragility of rented reach. A commercial narrative gives leadership something better than dashboards to rally around.

If the argument of this report is that marketing is not broken, but mis-specified for the environment, then Section 11 is the first step toward re-specifying it.

The next step is to turn these shifts into an executable operating model: what changes in planning, governance, incentives, team structure, measurement stack, and the weekly rhythm of work.

## 12.0 The New Framework

By this point in the report, we have done three things.

First, we have described the environment shift: marketing is increasingly operating inside volatile abundance, with weaker signal, more mediation, faster creative decay, and higher cross functional complexity.

Second, we have shown the symptoms this produces inside companies: pressure, credibility trials, KPI sprawl, reporting inflation, mistrust, and burnout.

Third, we have made the strategic case for the shifts required now: decision quality measurement, distinctiveness and meaning, distribution strategy, compounding systems, owned leverage, and a commercial narrative that leadership can repeat.

The framework in this section is the translation layer. It is how those shifts become a practical operating model.

### 12.1 Name it

#### **The 3-Horizon Momentum Model**

That name is deliberate.

Most marketing frameworks are optimised for planning activity, organising channels, or reporting performance. They assume the environment is stable enough that a plan can be executed and measured with reasonable confidence.

The problem we have described is not a lack of tactics. It is a mismatch between the inherited operating model and the new conditions.

So this is not another funnel, another campaign model, or another dashboard philosophy. It is an operating system: a repeatable way to run growth work under uncertainty.

### 12.2 Define it

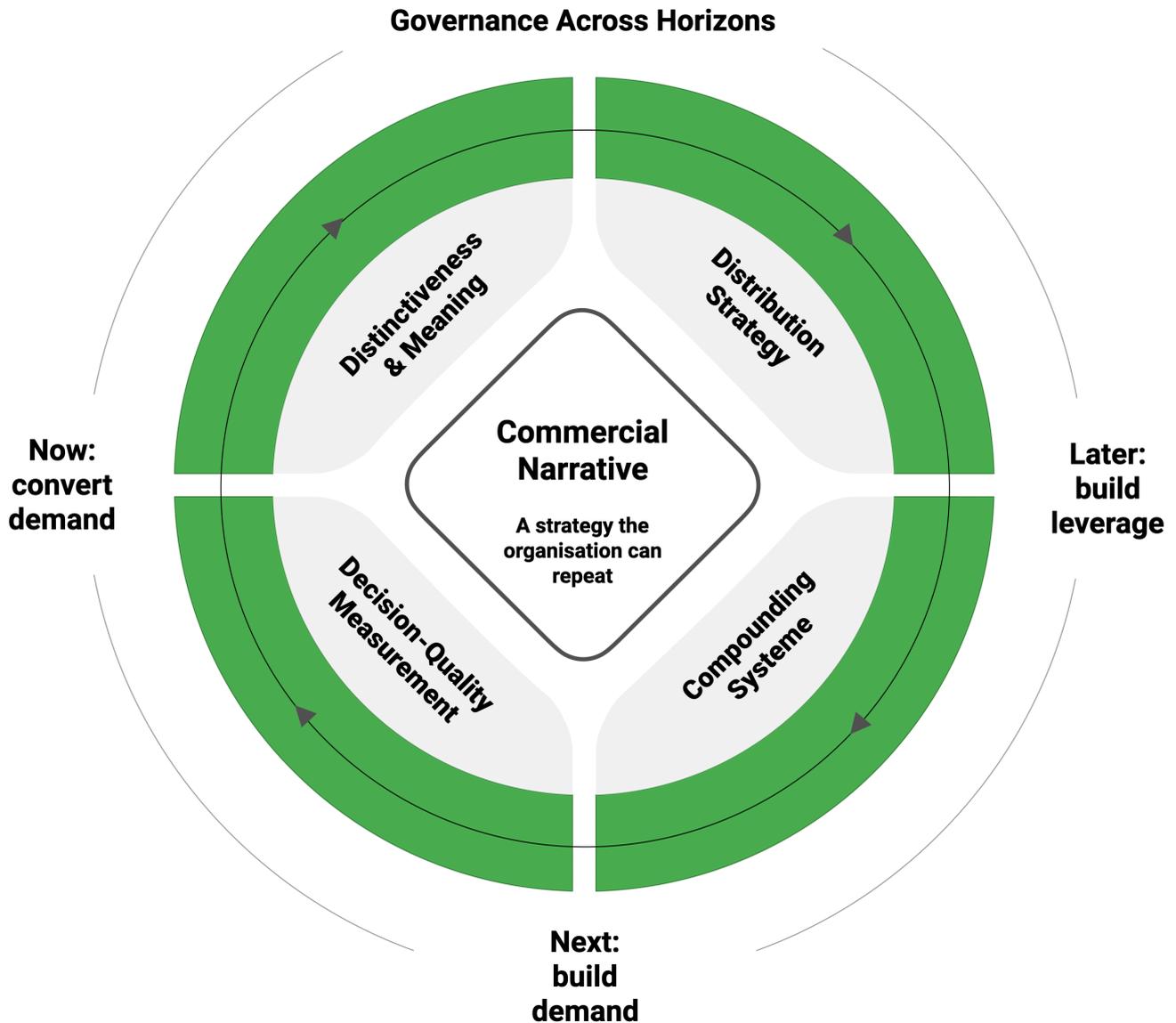
**The 3-Horizon Momentum Mode is a repeatable way to create, distribute, and compound demand, governed across time horizons, using decision quality measurement, anchored by a commercial narrative the organisation can repeat.**

There are three design choices inside that definition.

- It is anchored by a narrative, not a channel plan.
- It is built around compounding, not campaigns.
- It is governed across horizons, because short term pressure is now the default force that breaks good marketing.

## 12.3 Diagram it

The diagram you now have is not decoration. It is the logic of the system.



The 3-Horizon Momentum Model

### The centre: Commercial Narrative

This is the strategic spine. A commercial narrative is the simplest repeatable explanation of what the organisation is doing to win, why it should work, where uncertainty remains, and what signals we expect to see if we are right.

If you cannot state the narrative, the rest of the system becomes noise. You get activity without coherence. You get metrics without meaning. You get optimisation without a view.

## **The four operating domains (the flywheel)**

These are the domains that make the narrative real in market behaviour and commercial outcomes.

- **Distinctiveness and Meaning**

This is how the brand registers as itself in an abundance environment. It includes distinctive assets, creative standards, message discipline, and the meaning that makes preference resilient when sameness rises.

- **Distribution Strategy**

This is where the narrative meets reality. It covers where demand is created, where it is captured, what is rented versus owned, what rails the business depends on, and where leverage can be built over time.

- **Compounding Systems**

This is the shift from episodic activity to repeatable loops. It includes assets, mechanisms, and feedback loops that get stronger through use, rather than resetting each quarter.

- **Decision Quality Measurement**

This is measurement that exists to support better decisions, not to stage courtroom certainty. It is a learning system that combines causal methods where feasible with triangulation everywhere else.

## **The outer layer: Governance Across Horizons**

This is the control mechanism that stops the system being hijacked by short term proof demand.

The three horizons are simple, but they change everything.

- **Now: convert demand**

Capture existing intent, improve conversion, and protect cash flow.

- **Next: build demand**

Increase future intent through stronger memory, salience, and presence in buying situations.

- **Later: build leverage**

Reduce dependence on rented reach by building durable advantages: owned audiences, partnerships, ecosystems, reputation, and product led loops.

This governance layer is the difference between a framework that looks good on paper and one that survives real organisational pressure.

## **12.4 What it replaces**

The 3-Horizon Momentum Model replaces three inherited defaults that no longer fit the regime.

### **It replaces funnels as the main organising model.**

Funnels are still useful as a map of stages, but they are a weak operating model in mediated journeys, non linear buying, and cross functional growth reality. The new system is less about

moving people down a single path and more about building durable preference, presence, and conversion mechanics across multiple rails.

**It replaces campaign primacy with system primacy.**

Campaigns still matter, but they become outputs of the system, not the system itself. In a noisy environment, campaign volume is a tempting response, but it often produces movement without progress.

**It replaces attribution certainty as the legitimacy engine.**

Attribution will remain one input, but it cannot be the foundation of credibility in a declining signal world. The foundation becomes decision quality: honest measurement, fewer false certainties, and governance that leaders can trust.

## 12.5 Why it works in the new regime

It works because it is designed around the constraints we have already established.

**It assumes partial visibility.**

Instead of pretending you can observe everything, it formalises learning. It values triangulation, experimentation, and honest uncertainty.

**It shifts the scarce resource from content to attention and recognition.**

In abundance environments, generic output becomes expensive because it buys delivery without impact. The system therefore elevates distinctiveness and meaning as performance variables, not brand theatre.

**It treats distribution as a strategy problem, not a channel list.**

When discovery is mediated and rails are rented, distribution must be managed as dependency risk, leverage building, and long term presence, not just optimisation.

**It forces compounding.**

The flywheel is structured so that work feeds future work. Creative assets compound recognition. Distribution leverage compounds reach efficiency. Systems compound learning. Measurement compounds decision quality. This is how you escape quarterly reinvention.

**It is governance aware.**

The outer horizon layer is not a nice to have. It is the acknowledgement that time horizons, incentives, and proof demand are now central to marketing effectiveness. Without governance, the system collapses back into performance only tunnel vision.

## 12.6 How it handles the big trade offs

A framework earns its keep by resolving the tensions that normally break execution.

**Trade off 1: certainty vs learning**

The old organisation posture is to demand certainty, then punish the messiness of real systems.

The 3-Horizon Momentum Model chooses learning, but it does not abandon accountability. It changes the question leadership asks.

Not “what caused the result with certainty?”

Instead, “what should we do more of, less of, or differently, and why is that the most defensible bet?”

Decision quality measurement exists to make that bet better over time, not to pretend the fog is a straight line.

### **Trade off 2: efficiency vs resilience**

Pure efficiency thinking creates brittle systems. It pushes spend into the most measurable short term channels, then panics when returns decay.

The governance layer forces a portfolio. Now work protects cash flow. Next work builds future demand. Later work builds leverage so the business is not permanently paying tolls to access its market.

This is how you remain efficient without being fragile.

### **Trade off 3: short vs long**

Most organisations do not reject long term thinking explicitly. They starve it through short term pressure.

This framework makes the time horizon explicit and assigns it legitimacy. It creates permission to invest in the work that does not pay back inside a single reporting window, while still protecting the commercial reality of the quarter.

It also creates a cleaner internal narrative: long term work is not vague brand spend. It is a deliberate portfolio choice, governed and measured with credible proxies.

## **12.7 What it looks like in practice**

In practical terms, The 3-Horizon Momentum Model changes how plans are written and how performance is discussed.

- The plan starts with the commercial narrative and the horizon allocation, not the channel calendar.
- Work is designed to compound, not just to ship.
- Measurement is presented as a small set of credible signals tied to the narrative, not an endlessly growing dashboard.
- The leadership conversation moves from defending marketing to governing the system.

That is the bridge to the next section of the report. Section 13 turns this framework into an operating model and playbook: the planning cadence, portfolio allocation, team shape, measurement stack, creative system, AI governance, and an implementable 90 day reset.

## 13.0 The Operating Model + Playbook

Section 12 introduced The 3-Horizon Momentum Model as the translation layer between diagnosis and execution: a repeatable way to create, distribute, and compound demand, governed across time horizons, using decision quality measurement, anchored by a commercial narrative the organisation can repeat.

This section is the practical version.

It is not another planning template.

It is how you run marketing when the world is noisier, more mediated, less observable, and more cross functional than the operating models most teams inherited.

The purpose of this playbook is simple: **make good marketing survivable inside real organisations.**

Because without governance, cadence, and quality control, the system collapses back into short term proof demand, performance only tunnel vision, and quarterly reinvention.

### 13.1 The operating model blueprint

If you only do one thing from this section, do this.

Write the blueprint on one page, socialise it, and then use it to run the weekly and monthly rhythm.

**The blueprint has six components:**

1. **Commercial Narrative**
2. **Horizon Allocation** (Now, Next, Later)
3. **Portfolio** (what work exists inside each horizon)
4. **Operating Cadence** (weekly, monthly, quarterly)
5. **Decision Quality Measurement** (how we decide, not how we defend)
6. **Quality Control** (creative and AI governance)

This follows directly from the framework logic: narrative at the centre, four operating domains, and an outer governance layer that protects time horizons from short term pressure.

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### 13.1.1 The one page blueprint format

Use this format as your default.

#### **A) Commercial narrative (repeatable, board safe)**

- What we are doing to win
- Why we believe it will work
- Where uncertainty remains
- What we expect to see next if we are right

#### **B) Horizon allocation (explicit permission structure)**

- Now: convert demand (protect cash flow, capture intent, improve conversion)
- Next: build demand (increase future intent through memory, salience, presence)
- Later: build leverage (reduce dependency by building owned and earned advantage)

#### **C) Portfolio (the minimum viable set of work)**

- Now portfolio: conversion, capture, retention, distribution efficiency
- Next portfolio: distinctive assets, creative platforms, category presence, mental availability building
- Later portfolio: owned audiences, partnerships, ecosystems, product led loops, reputation and trust infrastructure

#### **D) Cadence (how work stays coherent)**

- Weekly: operating review, priorities, quality gates
- Monthly: learning review, portfolio rebalance, decision log updates
- Quarterly: horizon allocation review, major bets, kill list
- Annually: narrative refresh, strategy guardrails

#### **E) Decision quality measurement (the measurement posture)**

- Causal where feasible
- Triangulation everywhere else
- Few credible proxies tied to the narrative, not an endlessly growing dashboard

#### **F) Quality control (creative and AI)**

- Brand distinctiveness standards
- Creative review gates
- AI usage rules, what we automate, what we refuse to automate

## 13.2 Portfolio allocation across horizons

Most marketing teams do not fail because they cannot think of initiatives.

They fail because they cannot keep the right mix alive under quarterly pressure.

That is why horizon allocation is not a planning preference. It is governance.

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## 13.2.1 The default allocation model

Start with a default and adjust based on business reality.

A simple default is:

- **Now:** protects this quarter and removes friction from conversion and capture
- **Next:** builds future demand through consistent presence and memory building
- **Later:** builds leverage so you are not permanently paying tolls to reach your own market

The exact split will vary, but the logic should not.

If you run a one horizon operating model, you become efficient and fragile, then you panic when returns decay.

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## 13.2.2 Adjustment rules

Use these rules to prevent the allocation becoming ideology.

### **Shift more to Now when:**

- cash flow risk rises
- conversion is broken
- distribution rails are unstable and you need to protect capture

### **Shift more to Next when:**

- you rely on a small number of expensive capture channels
- you see diminishing returns and creative decay
- you need stronger memory structures in a noisy environment

### **Shift more to Later when:**

- you are overly dependent on rented reach
- platform volatility is a strategic risk
- you have no compounding assets and keep resetting every quarter

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## 13.2.3 The minimum viable portfolio

To keep the system healthy, ensure you always have:

- at least one meaningful Now loop that improves conversion or capture each month
- at least one Next programme building memory and distinctiveness continuously
- at least one Later bet building leverage that will still matter in 12 months

## 13.3 Planning cadence

Most teams plan in documents and then operate in chaos.

A cadence is how you stop that split.

The cadence exists to protect three things: coherence, learning, and the survival of long term work.

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### 13.3.1 Weekly operating rhythm

**The weekly meeting is not a status meeting.**

It is a system steering meeting.

Agenda:

1. **Narrative check**

What are we trying to make true, and did we behave like it this week.

2. **Portfolio check**

Are we still running the right mix across Now, Next, Later, or did panic steal the calendar.

3. **Quality gates**

What is shipping, and does it meet creative standards and brand distinctiveness, or is it polished sameness.

4. **Decision log updates**

What did we decide, why did we decide it, what evidence did we use, what would change our mind.

---

### 13.3.2 Monthly learning loop

The monthly review is where decision quality improves over time.

It is where you stop arguing about attribution and start governing learning.

Agenda:

- What did we learn about what works, for whom, and under what conditions
- Where do we have causal evidence, where do we only have triangulation
- Which proxies moved, and do we believe the story they imply
- What should we do more of, less of, or differently, and why is that the most defensible bet

---

### 13.3.3 Quarterly allocation review

Quarterly planning should be less about creating a new calendar and more about rebalancing the portfolio.

- Re state the narrative in one paragraph
- Confirm or adjust horizon allocation
- Choose a small number of bets, and a clear kill list
- Refresh the measurement plan and proxies

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## 13.4 Team shape and capabilities

A modern marketing system fails most often at the interfaces.

Too many handovers, too many dependencies, too many meetings, too little craft.

That coordination tax is now one of the main limiting factors in marketing effectiveness.

So the team shape needs to be designed for throughput and quality, not just role coverage.

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### 13.4.1 The smallest viable team map

Even in SMEs, you need clear ownership of:

- **Narrative and strategy** (commercial spine, positioning, choices)
- **Creative standards** (distinctiveness, assets, craft, taste)
- **Distribution strategy** (rails, dependencies, leverage building)
- **Compounding systems** (loops that get stronger through use)
- **Decision quality measurement** (experiments where feasible, triangulation everywhere else)

If those functions do not exist, the team will drift into output production and reporting theatre, because those are the tasks that survive scrutiny.

---

### 13.4.2 Horizon ownership

Assign horizon ownership explicitly.

Not because someone only works on one horizon, but because someone must be accountable for it surviving.

- Now owner protects capture and conversion
- Next owner protects demand building and brand memory work
- Later owner protects leverage building and dependency reduction

## 13.5 Measurement system

The measurement stack in this operating model is not designed to win internal arguments.

It is designed to improve decisions over time, without pretending the fog is a straight line.

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### 13.5.1 The measurement posture

Use a hierarchy:

- **Causal methods where feasible** (tests, incrementality, controlled comparisons)
- **Triangulation everywhere else** (multiple imperfect signals, used honestly)

This is the antidote to attribution theatre.

It keeps accountability, but it changes the internal question from “prove what caused this with certainty” to “what is the most defensible next bet.”

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### 13.5.2 Credible proxies by horizon

Your proxies should be few, legible, and tied to the narrative.

#### **Now proxies (conversion and capture):**

- conversion rate, lead quality, win rate, basket size, retention, cost to acquire, pipeline velocity
- Use with caveats, and avoid single platform truth.

#### **Next proxies (demand building):**

- brand search trends, share of search, direct traffic quality, reach against category buyers, brand tracking, memory cues recognition
- Use as directionality, not courtroom evidence.

#### **Later proxies (leverage building):**

- owned audience growth and engagement, partner driven reach, organic distribution efficiency, community contribution, repeatable inbound loops
- Use as proof that dependency is falling over time.

### 13.5.3 The decision log

Make decisions trackable.

For each major change, record:

- the decision
- the reasoning
- the evidence used
- the confidence level
- the signals that would confirm or falsify it
- the review date

This is how you build organisational memory, which is a form of compounding.

## 13.6 Creative system

In a high noise environment, creative quality and distinctiveness are performance variables, not brand theatre.

And when AI raises the baseline of competent output, the danger is that everything becomes polished and forgettable.

So you need a creative system, not just creative production.

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### 13.6.1 Distinctiveness and meaning standards

Define what makes your work clearly you:

- distinctive assets, visual and verbal cues
- message discipline, fewer claims repeated more consistently
- proof and meaning, so the brand is not just loud but trustworthy

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### 13.6.2 Quality control gates

Install light but firm gates:

- brief quality gate: is the narrative clear, is the audience clear, is the job clear
- concept gate: does it register as us, or could it be anyone
- final gate: is it coherent, crafted, and fit for the rail it will travel on

The goal is not bureaucracy. It is protection from rush and sameness.

## 13.7 AI governance

AI changes throughput and expectations inside organisations.

That means AI needs governance, not hype.

If you do not set rules, AI will amplify failure modes: output inflation, false confidence, and a drift toward templated work.

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### 13.7.1 What we automate, what we refuse to automate

A useful rule:

**Automate speed and structure. Refuse to automate judgement and integrity.**

Automate:

- research first passes and synthesis

- variant generation for testing
- production assistance within strong brand constraints
- workflow scaffolding, QA checklists, reporting assembly

Refuse to automate:

- final claims without human verification
- brand voice decisions without a human editor
- anything that risks trust, compliance, or reputational damage
- “more output” as a strategy

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## 13.7.2 AI quality assurance

Minimum standard:

- every externally facing output has an accountable human owner
- sources are checked when factual
- brand asset rules are enforced
- errors are treated as a systems problem, not an individual mistake

## 13.8 Implementation

Frameworks fail at the moment of handover.

So implementation here is designed as a reset, not a transformation theatre project.

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### 13.8.1 The 90 day reset

The 90 day reset has three phases.

#### **Phase 1: Stabilise (Weeks 1 to 2)**

- write the one page blueprint
- set horizon allocation
- define the weekly cadence and decision log
- install creative and AI quality gates

#### **Phase 2: Rebalance (Weeks 3 to 6)**

- kill low leverage activity that exists only because it is measurable or habitual
- build a minimum viable Next programme (distinctive assets and consistent presence)
- choose one Later bet that reduces dependency, even if it is small

#### **Phase 3: Compound (Weeks 7 to 13)**

- run the monthly learning loop twice
- improve one compounding system loop until it is measurably stronger
- produce fewer, better creative outputs that clearly register as you
- refine proxies and stop reporting metrics that do not change decisions

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## 13.8.2 The 12 month roadmap

Over 12 months, you are building three things:

- a stronger memory and distinctiveness footprint in the category
- a more resilient distribution position with less dependency risk
- an organisational learning engine that improves decision quality over time

This is how you escape quarterly reinvention: creative assets compound recognition, distribution leverage compounds reach efficiency, systems compound learning, measurement compounds decision quality.

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## 13.8.3 The stop doing list

Most teams cannot add a new operating model without removing old behaviours.

These are the most common stop items, drawn directly from the failure modes described earlier.

Stop:

- **Attribution theatre** as the primary credibility engine
- **Channel chasing** as strategy
- **Output inflation** as a substitute for distinctiveness and learning
- **Martech bloat** without decision value
- **Performance only tunnel vision** that starves Next and Later work
- **Rebrands as resets** when what you need is system repair

Replace those with:

- narrative clarity
- explicit horizon governance
- a managed portfolio
- decision quality measurement
- creative and AI quality control

## 14.0 A Week in the Life: The 3-Horizon Momentum Model in Practice

If you have made it this far, you have already done something most teams never get the time or permission to do.

You have named the forces that changed the environment. You have recognised the symptoms inside the function. You have walked through the strategic shifts that actually fit the regime. You have seen the framework, and you have read the playbook.

So this is not another diagram. It is not another promise.

It is what it feels like when the operating model starts to hold.

Not perfect. Not effortless. Still full of uncertainty, still exposed to volatility, still operating inside a world that refuses to give you clean answers on demand.

But coherent. Governed. Compounding.

A week in the life, after The 3-Horizon Momentum Model is in motion.

### **Monday: The Narrative Room**

Monday starts the same way it always used to. A full calendar. A Slack queue. A finance question waiting like a small stone in your shoe.

But the feeling is different.

Because the first meeting is not the weekly performance trial. It is the weekly narrative reset.

At 9:00, the core team is in a short call. Thirty minutes. Cameras optional. Notes mandatory.

On the screen is a single page that everyone recognises instantly. It is not a channel report. It is not a deck. It is the commercial narrative.

What we are doing to win  
Why we believe it will work  
Where uncertainty remains  
What signals we expect to see if we are right  
What we will do if we are wrong

The meeting starts with a simple ritual. Someone reads the narrative out loud.

Not because you forgot it.

Because speaking it forces it to remain simple enough to repeat.

Then you move to the horizon board. Three columns.

Now: convert demand

Next: build demand  
Later: build leverage

Under each, there are only a few active bets. Each bet has an owner. Each bet has a decision point. Each bet has a measurement posture that matches reality.

No one is allowed to add a new bet without naming what it displaces.

The real power of this meeting is not what gets approved.

It is what gets refused.

A request arrives mid call from Sales.

“Can we get a campaign up this week for the new bundle? The competitor has one live.”

Old marketing would have said yes, because saying no meant political risk.

3-Horizon Momentum marketing says:

“Maybe. Which horizon is it serving?”

Silence for a beat.

Then someone says it plainly.

“This is a Now play. It helps conversion. It does not build preference. It does not build leverage.”

“Okay,” you say. “What do we pause to make space?”

Sales does not love the question.

But they recognise the rule. Because the rule is not new. You have trained the organisation into it.

The outcome is not dramatic. It is boring. Which is the point.

You agree a small Now execution, but only if a piece of the work can be repurposed into Next, and only if it does not cannibalise the Later bet you are trying to protect.

You end the meeting with one sentence.

“Here is what we are doing this week, and here is why.”

Then you send the weekly note to leadership. Not a performance report. A narrative note.

It contains:

- the narrative in plain language
- the three bets you are progressing
- the one thing you are intentionally not doing
- the one signal you are watching

Finance replies within ten minutes.

“Thanks. This is very clear.”

That message used to be rare. Now it is normal.

Not because finance became nicer.

Because you stopped asking them to trust a dashboard, and started giving them a story they can repeat.

## **Tuesday: The Measurement Clinic**

Tuesday is measurement day, but it does not feel like court.

It feels like a clinic.

The team meets for forty five minutes, and the rule is written at the top of the doc:

Measurement exists to improve decisions.

Not to manufacture certainty. Not to defend marketing. Not to win internal debates.

You start with a quick scan of the conversion system. Now horizon.

What is demand capture doing?

What is slowing conversion?

What is raising friction?

What is breaking?

These are practical questions. Unromantic. Necessary.

Then you move to Next.

Not “did brand go up” in a week. Not “what is the ROI of memory.”

Instead:

Are we showing up more consistently in the buying situations we care about?

Are our distinctive assets being recognised?

Are we improving the quality of traffic and attention, not just the quantity?

Are we hearing the narrative echoed back in customer language?

And then Later.

What leverage did we build this week?

What dependency risk did we reduce?

What owned rail got stronger?

The room is calm because the posture is honest.

You still have numbers. You still have dashboards.

But the dashboards are fewer, and everyone knows what they are for.

One analyst says:

“Paid search is up, but I do not think it is because the ads got better. I think it is because the category is moving.”

No one panics.

No one says “prove it.”

You write it down as a hypothesis. You decide what to test. You decide what not to chase.

Someone asks the question that used to trigger dread:

“What drove the revenue lift last week?”

You answer with a narrative, not a single channel.

“Existing demand was higher than expected. We captured more of it because the checkout fix reduced friction, and the bundle message improved clarity. Paid helped, but it looks like the market moved too. We are treating that as an external factor until we can validate it.”

There are no caveats disguised as apologies.

There is simply reality.

And because the organisation has been trained into this style, reality is acceptable.

Not always. Not universally.

But more often than you would have believed a year ago.

### **Wednesday: The Creative Studio**

Wednesday used to be the day that broke people.

A constant churn of requests. A flood of AI generated outputs. A growing fear that you were producing more and achieving less.

Under the 3-Horizon Momentum Model, Wednesday is still busy.

But it is directed.

The creative team meets in a studio session. Ninety minutes. Phones down. One shared screen.

At the top of the board are the creative standards.

What makes us us  
What we never do  
What we always protect  
What we are experimenting with

There is a small library of distinctive assets. Not as a brand book relic, but as a working kit.

There is also a new rule:

AI can increase output, but it cannot override standards.

So AI is used for variation, iteration, and speed.

Not to replace judgement.

A junior designer says:

"I can generate twenty versions of this headline."

You say:

"Great. But we only ship the three that strengthen memory."

Someone from product joins and starts to ask for "just a quick graphic" for a release.

Old marketing would have nodded, and then resented it later.

Now you ask:

"Is this Now, Next, or Later?"

Product looks surprised, then thinks.

"This is Now. It supports adoption."

"Okay," you say. "Then it goes through Now standards. Clear, fast, conversion oriented. But we will not damage the narrative for a short term spike."

This is what coherence looks like in practice. Not a rejection of urgent work.

A way to stop urgent work from eating the whole system.

By the end of the session, you have shipped fewer pieces than you used to.

But every piece has a job.

And every piece fits the same spine.

The creative lead posts in Slack:

"Feels like we are building something again."

That message matters more than any content count.

Because it is the feeling of compounding returning.

### **Thursday: Distribution as Strategy**

Thursday is the day you face the rails.

Search. Social. Email. Partnerships. Marketplaces. Communities. Assistants. Referrals. Sales enablement.

In the old operating model, distribution was a list of channels.

In the momentum model, distribution is a strategy problem.

You treat it like dependency management.

Where are we rented?

Where are we owned?

Where are we over exposed?

Where can we build leverage?

A short meeting happens with the commercial team. Not a demand gen stand up. A distribution strategy review.

You pull up a simple map:

- demand creation rails
- demand capture rails
- trust rails
- retention rails

Then you ask two questions that change the temperature in the room.

“If one rail weakened tomorrow, what breaks first?”

“What rail would we build if we wanted to be harder to disrupt?”

This is where the future feeling comes from. Because you are no longer only responding to the week.

You are shaping the conditions of the next year.

A partnership opportunity appears. A trade body wants to collaborate. It is not immediately measurable.

Old marketing might have dismissed it because it would not show up cleanly.

Or pursued it defensively with a forced ROI claim.

3-Horizon Momentum marketing does something else.

It classifies it as Later leverage.

It sets a realistic expectation.

“This is a reputation and distribution bet. We will know it is working when we see referral lift, direct traffic lift, and more inbound from the segment. We will not pretend we can attribute every deal.”

Sales looks uncomfortable.

Then, oddly, relieved.

Because they also hate pretending.

By the end of Thursday, you have done something that used to be rare.

You have spent time building a rail that does not pay off this week.

And you did it without feeling guilty.

Because the governance across horizons gives you permission.

### **Friday: The Compounding Loop**

Friday used to be the day you collapsed.

A blur of admin. A scramble to update dashboards. A private feeling of, “We shipped a lot, but did we move anything?”

Under the momentum model, Friday is still full, but it has a ritual that changes everything.

The team runs a compounding review.

Not a performance review.

A compounding review.

Three prompts:

What got stronger through use this week?

What did we learn that changes a future decision?

What asset, mechanism, or loop did we build that will still be valuable in three months?

Someone mentions a new onboarding email sequence that reduced support tickets.

Someone mentions an updated category page that is now ranking and converting better.

Someone mentions that customer language from calls has been fed back into the narrative, making the next quarter of creative sharper.

None of it is glamorous.

All of it is compounding.

You then do a short retro, and the rule is blunt:

We do not punish honesty.

So people say what is true.

The paid lead says:

"I think we chased noise earlier in the week. We reacted too fast."

No one attacks them.

You capture the learning. You adjust the rule.

The creative lead says:

"We are still tempted to output inflate when pressure rises."

You write it down as an organisational risk. Not a personal weakness.

Then you do the final thing that makes the model real.

You close the week with a leadership note.

Not a deck. Not a panic. A clean summary.

What we progressed

What we learned

What we are protecting

What we are not doing next week, on purpose

A VP replies:

"Appreciate the clarity. This feels sustainable."

Sustainable is a word that used to feel impossible inside marketing.

Now it feels like the goal.

### **The Difference You Notice First**

The first thing you notice is not that results magically spike.

The first thing you notice is that the team stops living in a permanent defensive posture.

Meetings become about choices, not just explanations.

Work becomes about building, not just feeding.

Measurement becomes about learning, not just legitimacy.

You still face uncertainty. The environment is still noisy. The platforms still change. AI still accelerates expectations.

But the function is no longer fragile.

Because it is operating as a system.

And when the pressure returns, as it always does, the model does not remove the weight.

It redistributes it.

It gives you a way to hold the line.

It gives you a way to say: this is what we are doing, and this is why.

And slowly, week by week, you feel the most important shift of all.

Marketing stops being a function that produces activity.

It becomes a function that produces direction.

## 15.0 Bibliography

This bibliography compiles every source referenced across the current draft. It is intended as a practical, reader-friendly index of the evidence base behind the claims, frameworks, and examples used throughout the report.

A few caveats apply. First, some items are cited in multiple formats (for example, a report and a hosted PDF copy of the same report). Where duplicates were identifiable, they have been consolidated, but in a small number of cases near-duplicates remain because the draft references them in materially different forms (for example, page vs PDF vs slide deck). Second, some sources are web pages that can change over time. Third, some references in the draft are “pointers” to a broader body of work (for example, a standards page, a press release, or a landing page for a report). Wherever possible, these are retained as cited because they match what appears in the draft, but the most authoritative version may be the underlying report or primary publication linked from that page.

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# Thanks for reading!

*If you'd like to discuss how I can help implement some of the ideas in this research report, send me an email.*

