Winning in a Polarized World: The Growth Paradoxes

Phase One

Marketing2030 will identify the Marketing strategy, structure, capability, and CMO leadership characteristics required to drive sustained business growth and win in the future.

Led by the Institute for Real Growth (IRG) and the Future of Marketing Initiative (FOMI) at Oxford University's Saïd Business School, and supported by a world-class Challenger Board, the study comprises three phases, each delivering essential leadership learnings and practical takeaways:

The macro forces shaping society, consumption, and stakeholder expectations of businesses and brands.

The Marketing strategies, structures, and capabilities required to win.

The necessary CMO leadership characteristics required to lead in the future.

1. **Phase One**, the desk research and AI analysis phase, defines the trends, business and cultural shifts, and stakeholder expectations that businesses and brands need to understand. *(November 2025)*

2. **Phase Two**, the insights and best practice identification phase, includes learning from over 200 vision interviews with business and Marketing leaders globally. We will share key insights on strategy, structure, and capabilities. *(March 2026)*

3. **Phase Three**, the validation phase, involves data from an online survey conducted among Marketing leaders globally and identifies the CMO leadership characteristics required to succeed in the future. *(June 2026)*

The final project report will provide marketing leaders with a framework to help implement winning marketing strategies, structure, and capability recommendations, supported by practical examples, case studies, and tales from the trenches. *(June 2026)*

These are the findings of the first phase of Marketing2030, a year-long, groundbreaking study by the IRG and FOMI. Marketing2030's objective is to define the Marketing strategies, structures, capabilities, and CMO leadership capabilities required to win in the future.

In this first of three phases, the research team spent several months assessing and curating research on current and expected political, economic, social, and technological trends to define key stakeholder expectations facing businesses and brands. As part of this comprehensive study, over 250 business studies and reports were reviewed to identify the key themes, trends, and often-contradictory forces that business and Marketing leaders must address. These developments are presented here through six lenses we call "**The Growth Paradoxes**" – setting out the challenges of what is, for many leaders today, a rapidly changing, volatile, and confusing world.

Whiplash. Confusion. Volatility. Fragmentation. Opportunity.

Senior business leaders are experiencing all of these conflicting states, sometimes *even all in the same day*, as agreed-upon assumptions about how to operate a global business seem to be disintegrating without a clear alternative. Yes, complexity and the pace of change have been accelerating for years, but in 2025, we have reached a new stage: leaders who once felt confident in their ability to adapt are looking for new tools to adjust to the unprecedented pace of change. The rise of geopolitical instability and the onslaught of AI-led technology developments, just to name two massive trends, present what, for many, feel like existential challenges to the enterprise overall.

External economic and political forces, such as the rise of extreme nationalism, are rapidly fragmenting markets and increasing polarization. Advancements in generative AI, whose power and ability seem to multiply by the day, coupled with shifting demographics, are forcing a massive reset for all. And because the number and origin of messages, voices, and viewpoints has exploded, there is no longer one accepted way in which to consume information – or to build trust.

These developments present paradoxical challenges to business, and indeed to the world. What is the role of business in society at a time when other pillars, such as government and science, begin to crumble? By embracing these paradoxes rather than resisting them, companies and brands can uncover new ways to flourish. They can turn tension into creative energy and cultivate trust across divides. And they can unlock Humanized Growth, which creates value for customers, colleagues, communities, and capital markets.

The rise of generative AI and machine learning technologies amplifies these competing ideas, presenting massive opportunities for businesses – but also profound risks for social cohesion. AI drives efficiency, helping marketers generate enormous amounts of personalized content at scale. Yet these same capabilities are also eroding trust and creating an existential fear of replacement, as they accelerate the spread of disinformation and eliminate jobs. The power of the algorithm can be used to consolidate influence by politicians and others - and to amplify an existing mindset, leading to people occupying totally divergent information spheres. It entrenches stereotypes, normalizes extreme perspectives, and heightens societal division.

For businesses, brands, and leaders to succeed and for our society to flourish with what we call Humanized Growth, they must understand, acknowledge, and lean into these contradictory developments.

Below, we outline the key tensions for leaders to address, using six growth paradoxes as lenses through which to view the world. The paradoxes are not new, but the shifts and urgency behind them are, heightening the consequences of ignoring their impact.

We offer this work as a set of framing ideas to contextualize the pressures your business faces – and to make sense of this exciting and confusing era.

Paradox 1

Short *and* Long Term Value Maximization

Short *and* Long Term Value Maximization

How to maximize short-term performance while ensuring long-term, sustainable growth?

All public companies – and many privately-held firms – operate under extreme pressure to demonstrate short-term success. Shareholders can always vote with their feet if they aren't getting the returns they need. Private-equity-owned companies are even more likely to focus on the short term, because they won't be around to benefit from any long-term investments.

The rise of ESG has elevated priorities such as sustainability and equity, which require more time to demonstrate business value. But now its influence is waning in many parts of the world. We again see efficiency gains being diverted to the bottom line rather than being reinvested. This means that the balance between often intangible, long-term business and brand building versus short-term activation has become more contested and fragile.

The paradox, therefore, lies in how to deliver short-term value while still leading a "people-and planet-positive" operation, which remains both an expectation for many stakeholders and, in many parts of the world, also a regulatory requirement. The rise of performance-based marketing, focused on immediate payback, puts more pressure on long-term brand-building investment.

It is too simplistic to assert that the short-term vs. long-term debate is about shareholders versus stakeholders. Certainly, there are shareholders such as Warren Buffett, who champion a longer time horizon, just as there are stakeholders with more immediate goals, such as an increase in pay or lower prices. However, especially in this AI-driven environment, where game-changing decisions are made in days or weeks, the paradox of managing for both the short- and long-term has only intensified.

Paradox 2

Globalization *and* Localization

Globalization *and* Localization

How to drive global scale efficiencies and cater to local preferences as geopolitical fragmentation and consumer preferences become more extreme?

Over the past few decades, firms have gone all in on globalizing everything from technology to supply chains. Yet, recently, countervailing factors such as regional regulations, tech-based communities like Discord and extreme nationalism have emphasized local and more personal choices. Where a product is produced now has either a negative or a positive connotation, depending on whom you are asking.

Despite global connections being more seamless than ever, this isn't translating to a more global mindset. Nearly half of consumers in a recent McKinsey study indicate that locally owned companies drive their purchase decisions, with an acceleration in this shift from Q1 to Q2 2025 in Canada and the US.

Global reach, scale, and efficiencies still matter; in fact, they are even more critical today. At the same time, the pendulum is rapidly shifting in favor of distinct, and often opposing, local values and identities. Technology companies are addressing this by further centralizing the production of their hardware while also heavily leaning into localization with their software solutions. Businesses must be sensitive to the diverse needs of different locations, communities, and contexts.

To balance these competing ideas, businesses can learn from how creator and community-led growth is successfully driving interaction. Creators are cultural translators who invent alongside their communities and understand how local norms boost authenticity. And momentum in the online worlds is driven more from interest-based sites like TikTok and Reddit than by more general social networks. Barbecue grill company Big Green Egg encourages customers to "disconnect to reconnect" and purposely only works with local distributors who build lasting relationships.

> The challenge is clear: preserve the advantages of scale while meeting the demand for cultural specificity and personalization.

Paradox 3

Agility *and* Stability

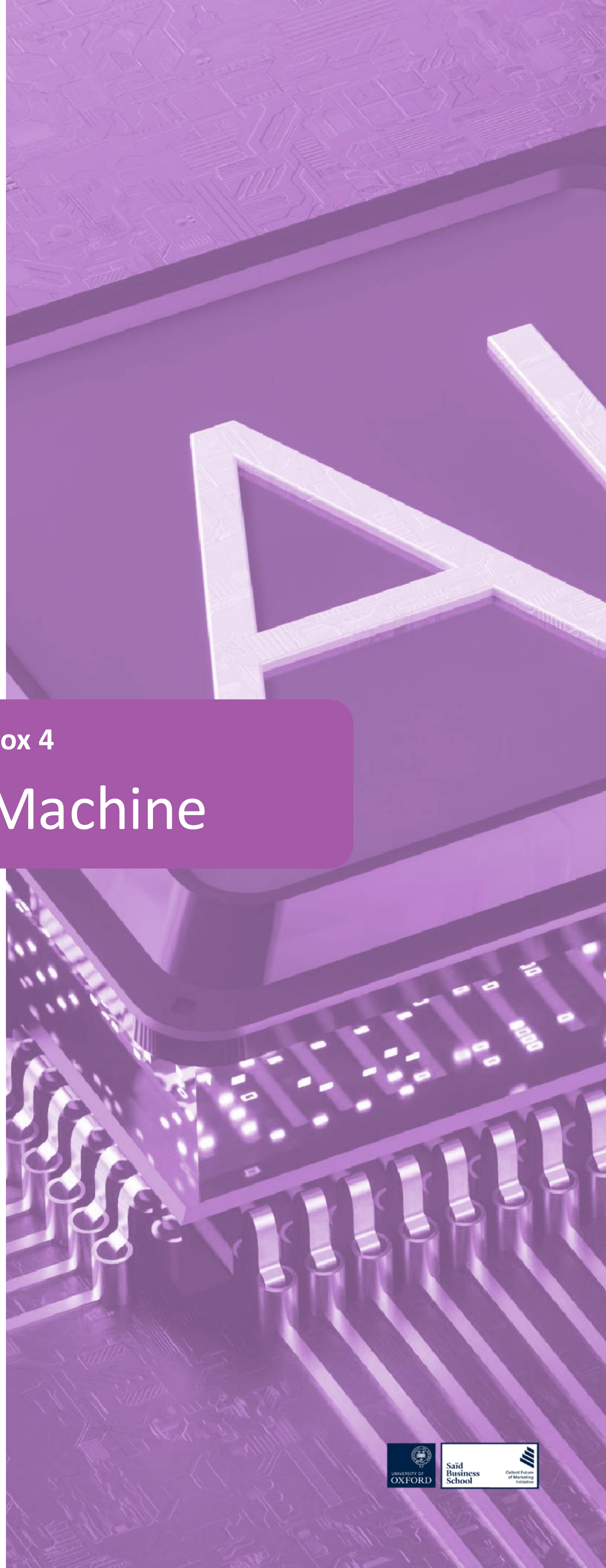
Agility *and* Stability

How can organizations rapidly adapt and transform while also providing the trust, stability, and safety that their teams need to engage, experiment, and thrive?

Continual disruption has become standard operating procedure for any business today. Leaders must constantly and quickly adapt their organizational design, processes, and capabilities, because consumers value innovation. And yet many leaders today feel unable to keep up with the latest AI-generated developments or the latest geopolitical twists and turns. Adding to this is the inability to set the tone, as consumers now have the power to drive messaging that can impact your company's reputation or earnings in a matter of hours.

The same Is true for individuals, who feel even less agency over their futures. *The Ipsos Global Trends Report 2024* reports that more than 80% of citizens across 50 global markets feel that the world is moving too fast. This ongoing instability causes employees, customers, and investors to gravitate toward companies and brands that represent structure and safety. A 2025 Consumer Research report from Salsify found 87% of respondents said they'd pay more for products from brands they trust.

Organizations must straddle this paradox carefully. They must drive digital transformation while holding to some form of stability and reliability that grounds teams and lets them focus, learn, and grow. Particularly as AI takes hold, employees need to have a role in change processes, helping to co-design new workflows and being given the opportunity to learn new skills and explore alternative career paths.



Paradox 4

Human *and* Machine

Human *and* Machine

How to embrace the differences and bridge the gaps between humans and machines?

The rapid adoption of AI is transforming the business and Marketing. New tools deliver speed, scale, and decision support, allowing for routine tasks to be automated, data to be analyzed, and pilots and innovations to be launched almost instantaneously. The assumption, so far, is that this technology will greatly enhance productivity, with massive financial benefits accruing to companies and their owners.

Already, companies such as Amazon are cutting jobs, acknowledging that their machines can do things quicker, better, and most importantly, cheaper. But what will this mean for the futures of the humans who actually do the work, particularly those with a particular skill or trade that is no longer needed?

There is something else at stake: the erosion of human craft and originality, particularly in creative domains. Even acknowledging that many boring and repetitive tasks will be handled by AI, most people still desire the real-life spontaneity and authenticity that comes from interacting with a human being.

Contemporary AI is based on historical data – a process that often includes bias and may perpetuate inequalities, hindering true innovation. Many people fear that overreliance on AI may separate us from the creative aspect of humanity. Business and brand leaders must strike a balance between human and machine inter-connectedness; They must boost efficiency while retaining human creativity and authenticity.

Paradox 5

Hyper-Personalization *and* Privacy

Hyper-Personalization *and* Privacy

How to cater to an individual's preferences while respecting consumers' increasing demand for control over their personal information?

Personalization, or the ability to deliver the right product, message, or service at the right moment to the right person, has long been the Holy Grail of Marketing. Over the past decade, cookies, analytics, and other tools have allowed marketers to track a consumer's intent. Today's landscape is radically different; Algorithmic feeds, real-time analysis, and generative AI can now anticipate rather than respond to consumer needs. Content can actually be delivered *before* an intention is consciously formed.

TikTok's "For You Page" moves away from personally-curated content based on who you follow to an algorithmically-controlled environment that uses predictive systems to boost engagement. It is convenient and precise, yes, but it also comes at the expense of personal choice.

Another issue is the question of who the customer actually *is*; Marketers could soon be selling to AI agents rather than the consumers themselves.

There may be the beginnings of a privacy backlash, in which consumers demand the right to grant or deny permission to receive content rather than simply having it delivered. Yet it is not consistent; Europe is a global leader on this front, having rolled out GDPR over 10 years ago, while in other regions, there are no consumer protections to speak of. These differences can have a significant business impact, as seen in Meta's recent decision not to roll out its multimodal AI virtual assistant in the EU.

> The challenge of this paradox is clear: Businesses must design a process that respects users' wishes for personalization, making it feel chosen rather than imposed. Brands will have to be consumer-centric enough to be *invited into* consumers' worlds rather than *forcing* their way in. It is important to highlight the significant difference between generations here; younger, more socially savvy consumers are willing to trade privacy for other benefits, while older ones find it more intrusive. Business leaders will need to adapt their approaches to consent, frequency, and format.

Paradox 6

Digital *and* Personal Connectivity

Digital *and* Personal Connectivity

How to balance online engagement and digital commerce with real-life experiences and personal connections?

It's incredible, but true: the most essential act of one person connecting with another has become increasingly polarized as digital technologies have begun to substitute for physical interaction. This shift has major implications. First, the boundary between individuals' online and offline identities is blurring, which means that "virtual" interactions are now considered part of lived reality. Second, the ability to feel as if you are "in" the world without leaving your sofa satisfies many essential emotional needs. Yet it also disincentivizes the messiness of real-life interaction and reinforces isolation.

This shift to digital has created a literal epidemic of social isolation and loneliness, even as it was intended to have the opposite effect. Today, this is particularly true for younger people, but increasingly also for the older generations sitting at home, alone.

The challenge for leaders is to provide seamless end-to-end consumer journeys with the convenience of digital solutions, while also finding affordable ways to offer human connections when needed. If they lean too heavily into the digital side, the risks will impact business and society. And yet if they are unable to take advantage of the ability to literally travel inside a consumer's pocket (or, perhaps, brain), they may not be in business for much longer.

Next Steps

The shifts described for each of these growth paradoxes can help business and brand leaders globally with a set of strategic planning assumptions to guide their strategy development. They describe the expectations that stakeholders have of businesses and brands today and into the future.

While it is undoubtedly the most challenging time to be a top business and Marketing executive, the developments within each of the growth paradoxes also provide an incredible opportunity for value creation, growth, and developing a competitive advantage. When the going gets tough, the tough get going.

The leaders who best understand the balance between human and machine, art and science, process and innovation have a massive role to play in helping the enterprise flourish in these difficult times. The ability to successfully balance these seemingly contradictory concepts and respond with more humanized growth strategies is critically needed in this moment.

This is an unprecedented opportunity for whole-brain, Da Vinci-like leaders to step forward and help their business navigate this uncharted territory, and to provide a new growth roadmap for the years and decades ahead.

Phase Two of Marketing2030, to be released in March 2026, will feature insights and learnings from over 200 senior Marketing and business leaders globally, focusing on the Marketing strategy, structure, and capabilities required to win in the future.

To contribute to Marketing2030, or to ask a question, please contact:

info@instituteforrealgrowth.com

To contribute or join the M2030 Collective and stay connected, scan the QR code:

Marketing2030 Partners