NTT DATA

2026

Evolution of Digital Marketing in Latin America

Competitive advantage evolves from adoption to orchestration



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Acknowledgments

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01

Introduction



Introduction

In every country of Latin America, organizations are advancing at different paces in adopting digital marketing, digital commerce, data, and artificial intelligence (AI) capabilities.

The competitive differentiator is no longer about simply "having a digital presence," but rather about integrating strategy, data, technology, and operations to generate sustainable growth, efficiency, and a better customer experience.

This edition of the Evolution of Digital Marketing in Latin America 2026 report offers a structured view of the regional maturity level and, above all, identifies the opportunities organizations can use to capture greater value through digital transformation, advanced automation, and applied artificial intelligence.

Analyzing the evolution and main trends of digital marketing in Latin America is the main purpose of the research, based on a comprehensive assessment of the maturity of the participating companies.

To establish the parameters, the study questioned how solid and consistent the digital strategy is (formalization, depth, and execution capabilities) and what the real level of adoption and integration of artificial intelligence is within processes and decision-making.

It also asked how the multichannel experience is managed and coordinated throughout the journey, and what role digital commerce occupies within the marketing agenda, including its enabling capabilities and the most relevant gaps for scaling results.

These parameters provide a clearer picture of the current landscape in Latin America and the challenges companies face, while highlighting the growing importance of combining AI with data—not only customer data, but data across every stage of the digital marketing process.

02

Executive Summary

Executive Summary

Digital Marketing in Latin America 2026 **highlights a regional shift where marketing is no longer defined by "adopting channels,"** but by integrating data (identity and traceability); operations (automation and content); and measurement (KPIs connected to the business).

The results of the one-on-one dialogues reveal more clearly the friction points that explain the maturity gaps: **real customer knowledge** in operations; **technological adoption** growing faster than integration; how AI cuts across the executive agenda; and the **structural challenge of the industry when trying to standardize measurement in order to optimize based on business impact.**

Customer knowledge and activation: The critical gap

According to the results, nearly **70%** of respondents say they segment using their own first-party data, but the real differentiator appears once that segmentation turns into consistent experiences; however, only 14% report a high level of personalization based on consumer behavior.

The gap is not about "having data", but about activating it consistently across customer journeys, generated content, and customer decision-making.

Banking/Fintech stands out for its high levels of customer knowledge, while **Retail** emerges as the clearest example of advanced personalization.

Even so, tension persists because it is possible to segment well and still fail to make decisions in real time at scale.

Marketing Technology (Martech): Fewer tools, more integration

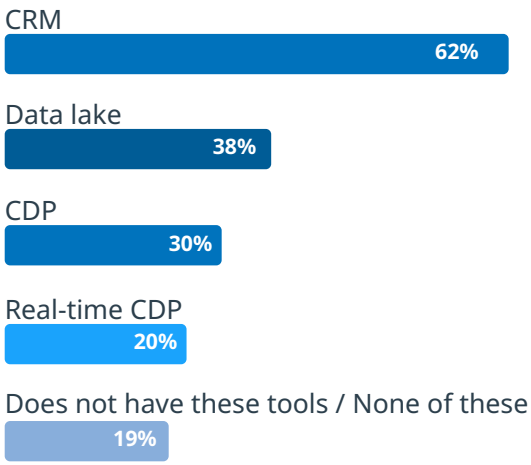
The regional landscape confirms that maturity does not depend on "having tools," but on whether the technology stack enables organizations to unify data, connect systems, and activate audiences consistently.

The starting point is CRM, and sophistication increases as integration layers are added: data lake; CDP and, at the most advanced stage, real-time CDP. In contrast, **some companies report not having these tools at all.**



A critical nuance in the research is that **"CRM" is still frequently used as a synonym for commercial management/pipeline**; therefore, declared adoption does not equate to maturity if data integration + activation does not exist.

Use of data management tools



Automation: the leap in connecting data + operations

The shift in productivity doesn't stem from simply "having workflows," but from turning them into an operating system connected to data—spanning everything from enriching data and building audiences to ensuring continuity across the entire funnel.

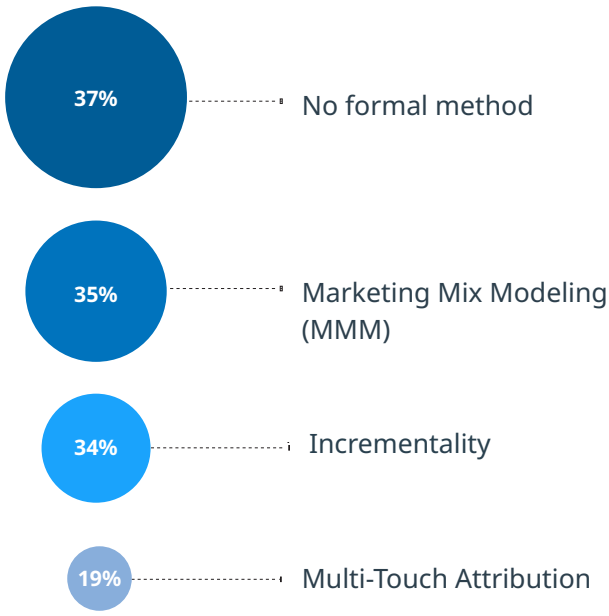
The study shows heterogeneity by sector and market, but the pattern remains consistent: where integration exists, automation stops being an experiment and becomes scalable.

By industry, **Retail** and **Banking/Fintech** emerge in the research as the most advanced benchmarks: the former stands out for a more visible presence of complex automation, while the latter is distinguished by widespread adoption and more robust database/ analytics infrastructure that enables automation throughout the entire customer lifecycle.

The key takeaway on this topic is not "having a CRM," but how connected the operation is: when data is governed, unified, and actionable, automation becomes consistent and measurable.

Among the findings, it stands out that the standard for maturity is becoming more demanding: "having a CRM" loses weight as a sufficient indicator, and advanced/ complex automation gains relevance as an indicator of real integration.

Marketing measurement models



Measurement and attribution: The bottleneck

Although **35% report having digital KPIs integrated with business objectives**, in practice measurement remains mostly tactical: 47% measure by channel, and only **7%** connect channel contribution to metrics such as earnings before interest, taxes, depreciation, and amortization (EBITDA) or market share.

Without a common measurement framework, investment ends up being optimized against partial metrics rather than real incremental impact.



Artificial Intelligence: High intention, unequal scaling

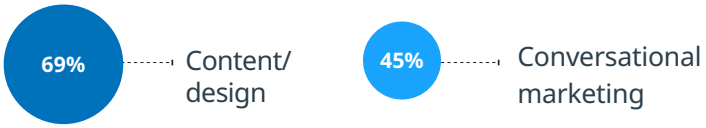
The question for executive leadership is no longer whether AI will be adopted by the organization, but **what competitive advantage they want to build with artificial intelligence and on what horizon:** productivity to accelerate execution or structural capability to improve commercial decisions and sustain differentiation?

The research confirms a split market: 40% already assign it a medium-high priority, while 30% keep it very low or off the agenda.

The gap stems from recurring operational barriers—data risks, tool maturity, talent gaps, and a lack of strategy—suggesting that organizations are attempting to scale AI without first addressing the fundamentals: data governance, quality and traceability, and a clear accountability framework.

As a result, AI adoption is concentrated in use cases where ROI can be realized quickly and reliance on data is lower.

Main uses of AI



In contrast, in the area where AI truly impacts the P&L—real-time personalization, automated nurturing, forecasting—**adoption remains below 15 percent**.

Commerce grows, but the gap in integration and measurement remains

Digital commerce already operates as a direct lever for revenue and experience, with clear progress in execution (technology inventory, payments, deliveries) and a channel strategy where the owned ecosystem (website and app) remains the core, while tactics such as conversational commerce, marketplaces, and social networks are added to expand reach and capture demand.

The main gap is not "having e-commerce," but truly integrating it with marketing: a fragmented approach that limits conversion and efficiency still predominates.

In terms of data, there is a solid foundation for building audiences, but **the pending leap is moving from segmenting to activating**: advanced personalization and automation (including real-time AI) are not yet widespread.

In measurement, the sample indicates the scenario remains intermediate: some organizations connect indicators to business results, but many remain at basic metrics, and few apply advanced models.

Finally, **in operations, there is a clear focus on delivery speed and local payment methods**, alongside signs of a push toward driving conversion through financing options such as BNPL (Buy Now, Pay Later).

Executive Recommendations

01.

Define a minimum viable integration:

(data sources, identity, traceability, and governance) and connect CRM with activation before scaling real-time capabilities.

02.

Convert segmentation into actionable personalization:

Prioritize 2-3 high-impact journeys (nurturing, retention, cross-sell) backed by a sustainable content operation.

03.

Standardize measurement:

Move from channel-specific metrics to 3-5 stable executive KPIs connected to the business, utilizing a common language across marketing, data, and finance.

04.

Professionalize attribution by stages:

Implement data standardization + integrated reporting first; then move to models (MMM/ MTA) and incrementality testing once the foundation supports it.

05.

Manage AI as a value portfolio:

Sustain quick wins to fund the shift, but establish a "business AI" front with three non-negotiable decisions: reliable data, a business KPI to move, and a process to redesign (not just a tool to buy).

03

Main Findings



Main Findings

3.1 Evolution of Digital Marketing

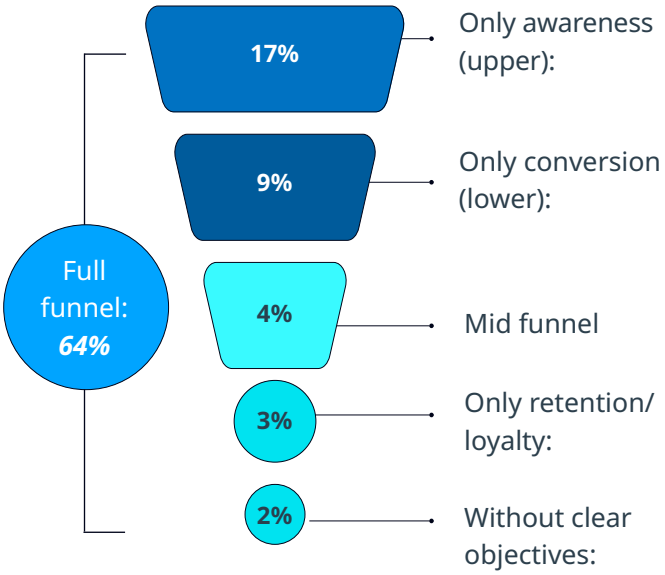
The 10 Latin American countries show that the discussion is no longer about whether to "do digital marketing," but how to design and govern a strategy that connects objectives, investment, and specific initiatives with business results.

In general, the regional landscape shows that organizations operating with an integrated approach (full-funnel, business KPIs, and continuous optimization) coexist with others that still execute useful tactics but with less formalization and little connection between measurement and decision-making.

3.1.1 Strategy objectives

One of the highlighted points is that a large portion of companies demonstrates a more comprehensive planning approach: 64% report having objectives that cover the entire funnel (acquisition–consideration–conversion–retention).

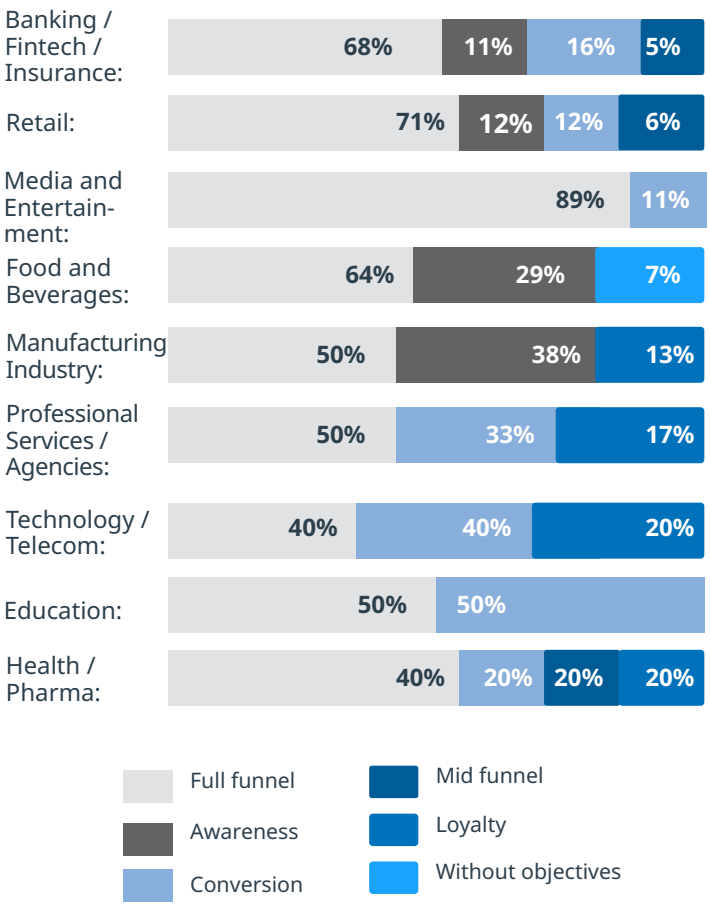
Strategy focus by funnel stages:



Even so, significant fragmentation persists, as some focus solely on awareness, while others concentrate on conversion, mid-funnel, or retention.

This shift toward a full-funnel strategy contrasts with the 2024 benchmark, where the report found that **50%** of organizations had adopted a comprehensive approach and there was still a larger portion of partial strategies, such as those focused on specific short-term results or awareness.

Strategies by funnel stage across industries



> Strategy stops being a static document and becomes a living system. Tactics cannot be rigid: you have to evolve with the market."

Enrique Cornish, CMO
BBVA México

What truly stands out is not just the regional average, but the pattern according to the type of industry or business model.

3.1.2 Investment

The *Digital Marketing in Latin America 2026* study shows a region with highly uneven investment. Among those who report their annual budget distribution allocated to digital marketing, **thirty-two percent already allocate more than half of their resources to this area**, but on the other hand, **forty-four percent still assign less than 30 percent**. The rest fall within intermediate ranges from 31 to 50 percent.

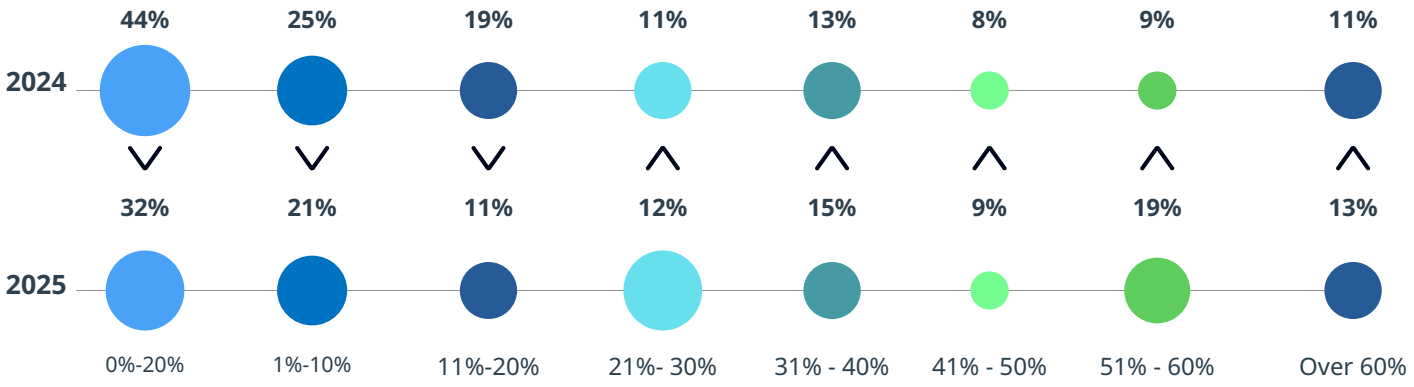
This highlights that there is no single standard, as some organizations are digital-first—meaning they consider digital technology at the core of their strategy—while others still operate with a more traditional approach.

By sector, the analysis confirms that investing more is not always synonymous with greater maturity; for example, in Retail, 40% of companies allocate more than 50% of their budget to digital marketing, while Banking/Fintech only allocates 25 percent.

According to the business model, B2B2C and mixed models tend to allocate more resources (39% and 40%), which represents 50% more than B2B (18%).

Compared with 2024 data, the benchmark was more conservative in its projections: fifty-one percent planned to allocate less than 30% to digital and only a minority expected to surpass high thresholds. In 2025, a larger share of organizations is already allocating significant resources to digital marketing.

Annual investment in digital marketing



3.1.3 Use of digital media

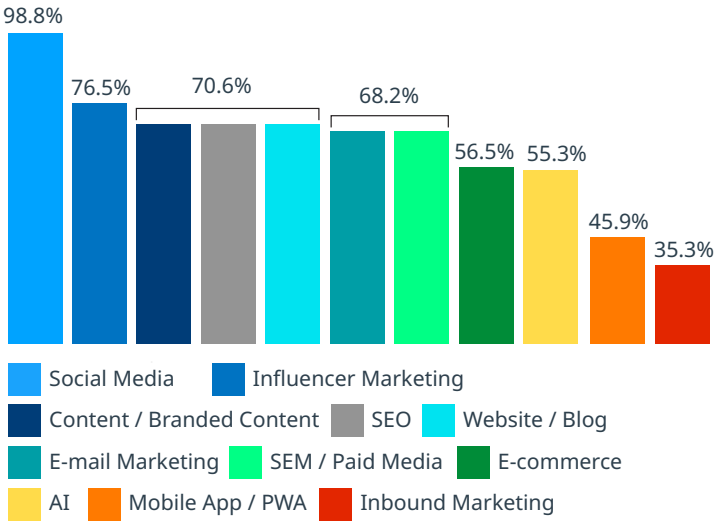
In general, the region relies on a strategy that combines always-on media with growth-oriented initiatives.

Social networks are nearly universal, followed by a well-established set of tactics used by around **70%** of companies: influencer marketing, SEO, websites/blogs, branded content, email marketing, and paid media (SEM).

In this area, **two clear signs of evolution stand out: e-commerce sites and AI projects**. Both are already active initiatives across a significant share of organizations, suggesting that commerce and intelligent automation are becoming core components of the strategy rather than isolated or secondary efforts.

Differences by industry help explain "what moves the needle." As a reference, the study conducted in 2024 already showed a very high base in "classic" channels like social networks and websites above 90%, email at 72%, and SEO/SEM around two-thirds. The current pulse maintains those foundations and adds more relative weight to initiatives linked to commerce and AI.

Initiatives used in digital marketing strategy



NTT DATA & Tangity — Insights

Beyond the quantitative results, it is worth highlighting that over the recent period, the evolution of SEO toward optimization approaches for generative engines (GEO/LLMO) has accelerated.

Although this transition is not yet fully reflected in quantitative data, it is already visible in strategic conversations with leading organizations. More and more companies are adapting content, markup, and information architecture to improve their visibility in AI-assisted responses, broadening the focus from traditional ranking toward presence in conversational and generative environments.

Practical implications for leaders:

If the objective is already full-funnel, the next bottleneck is connecting digital KPIs to business KPIs, since this connection remains unresolved for roughly one in four companies. Optimization tends to stay stuck in channel metrics.

The "maturity vs. investment" gap suggests prioritizing governance, measurement, and prioritization over simply "allocating more budget." Without evidence of a real and scalable benefit, this type of funding becomes difficult to sustain.

3.2 Audiences and Customer Knowledge



According to the study, customer understanding across Latin America is increasingly supported by first-party data and stronger audience segmentation capabilities.

Regionally, 60% of organizations report high levels of customer knowledge from a data perspective (e.g., they have a clear first-party data strategy and/or journey traceability) and 63% declare high levels of segmentation.

This result is referenced with caution because the sample is heavily composed of large enterprises, thus describing the most advanced segment of the market.

It represents a snapshot of the "leading front," not necessarily the regional average, because medium and small companies usually face more data fragmentation, less integration between channels, and less operational capacity to sustain continuous execution.

NTT DATA & Tangity — Insights

Among large companies, we are seeing significant progress in the consolidation of first-party data, evolving toward a clearly privacy-first approach. Beyond the accumulation of first-party data, the emerging standard includes actively managed consent, server-side tagging, and secure collaboration environments such as data clean rooms, which enable activation and measurement without compromising sensitive information.

Competitive advantage no longer comes simply from having data, but from being able to use it within robust governance and compliance frameworks.

3.2.1 Segmentation and Personalization

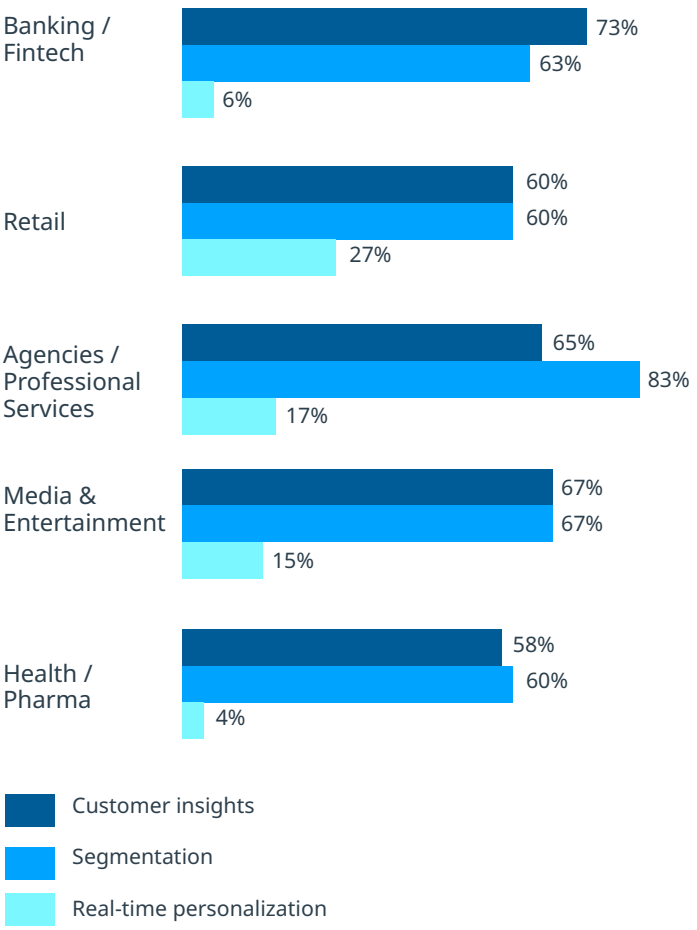
In practical terms, the market can be considered relatively mature in segmentation because around 70% already classify using their own data, but advanced personalization is still a minority, with only 14% of companies declaring they perform it in real-time and based on behavior.

The conclusion is clear: segmenting is relatively common; real-time personalization is not.

In countries with a sufficient sample base, two relevant signs appear: **Brazil** ranks among the highest in customer knowledge, while **Peru** and **Mexico** stand out in segmentation.



Sectors with highest maturity in data and activation



The difference between the most advanced organizations and the rest is not just having data, but being able to connect it to the customer journey and operate consistently across campaigns and automation.

When it comes to industry type, the pattern is also clear. **In customer insights, Banking/Fintech leads** (**73%** at high levels), followed by **Retail (60%)**, driven by a combination of traceability, transactional data, and analytical capabilities.

In segmentation, the Communication & Media industry appears alongside Banking/Fintech and Retail at high levels. In **advanced personalization**, the clearest differentiator is seen in **Retail (27%)**, while in **Banking/ Fintech** it remains low **(6%)**.

This demonstrates that while solid segmentation is common, there are greater restrictions when executing real-time decisions at scale.

The region has made progress in data and segmentation, but the gap remains in turning that into advanced personalization, which relies on consumer identity and traceability, automation/decisioning, and a content operation capable of sustaining dynamic customer experiences.

3.3 Marketing technology (Martech)

The study's key takeaway on marketing technology (Martech) is straightforward: maturity does not depend on having more tools, but on whether the technology stack enables organizations to unify data, connect systems, and activate audiences consistently.

Across Latin America, two realities coexist: on the one hand, an established base of organizations already operating with familiar tools (CRM, analytics, social media); on the other, a structural gap in which the adoption of more advanced tools (data lakes, CDPs, and real-time capabilities) remains limited. In some markets, even the basic infrastructure needed to operate consistently is still lacking.

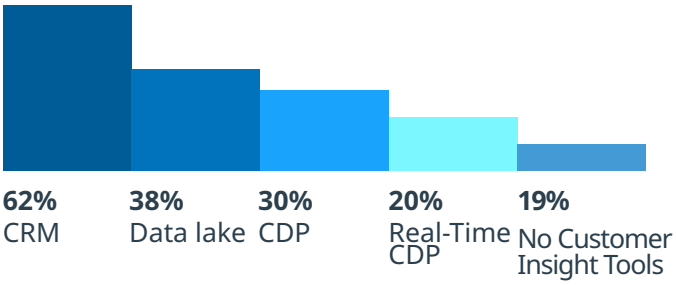
> ***NTT DATA & Tangity — Insights***
>
> *In fact, with the SaaS (Software as a Service) crisis, less traditional trends are beginning to emerge, where "suite-style" stacks are evolving toward composable architectures, where the data warehouse becomes the core and activation is enabled through reverse ETL and event-driven architectures.*
>
> *In this model, differentiation does not depend on a single platform, but rather on the ability to integrate data, decisioning, and channels in a flexible, scalable, and decoupled manner.*

3.3.1 Tools for Customer Knowledge

The starting point for achieving consumer understanding continues to be the CRM. Sophistication increases as the stack adds integration and unification layers: data lake, CDP and, at the most advanced stage, some firms add tools like real-time CDP.

In parallel, a relevant gap persists because 19% of companies state that they do not have any of the above options.

Adoption of customer insight tools



A key nuance is what is understood by "CRM" in regional practice. In many organizations, CRM still functions more as a sales management/pipeline tool than as a comprehensive customer data platform connected to segmentation, automation, and personalization.

Therefore, a declared adoption of CRM does not necessarily imply maturity in activation, since the real leap occurs when it integrates with other sources, becoming traceable across the journey and feeding audience operations.

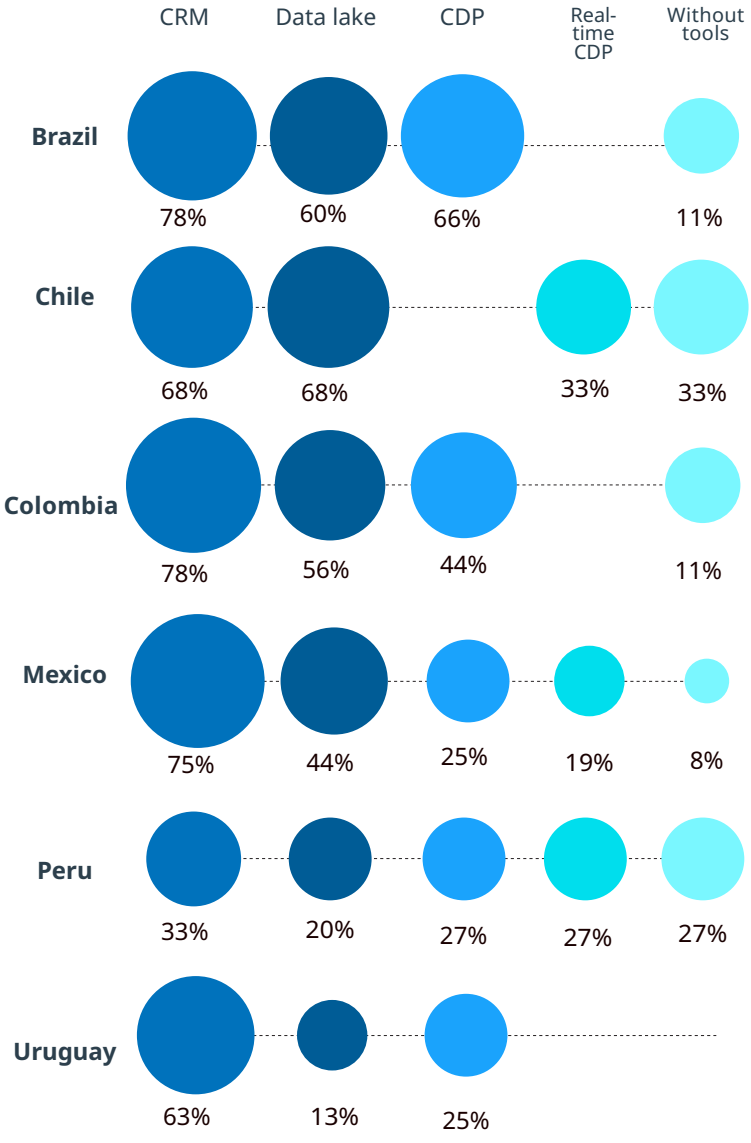
Several markets stand above the Latin American average in terms of instrumentation. **Brazil** stands out above the standard in both base and integration: nearly 8 out of 10 organizations already have a CRM and data lake, and around two-thirds operate with a CDP.

Colombia also ranks above the average across all three layers: CRM at levels similar to Brazil, data lake in a significant proportion, and CDP around 4 out of 10, while keeping the block of organizations without tools low (around 1 out of 10).

Mexico is emerging as a maturing market due to its strength in CRM (near three-quarters) and with moderate adoption of data lakes, while CDP is still expanding with approximately 25% of responses, and real-time CDP progresses but is still a minority. Even so, the group without tools is relatively low at less than 1 out of 10 companies.

At the other extreme, **Guatemala** concentrates the most pronounced gap: more than half report having no tools, which shifts the priority from "refining" to building a minimum foundational baseline.

Maturity of the technological stack by country:



When viewed by sector, the pattern is consistent with operational needs: **Banking/Fintech** tends to lead in integration via data (**data lake at 53%**, above the regional average); while **Retail** stands out especially for the presence of **CDPs (38%)**, consistent with the pressure for actionable audiences and activation based on behavior/transactions.

In business models, the most instrumented profile is **B2B2C**, ranking above average in integration layers (**data lake 54% and CDP 50%**). In contrast, the **B2B** segment remains lagging, combining only **17% in data lakes and with CDPs practically absent**, which usually limits the possibility of carrying out sustained personalization and automation.

> “Technology and data enable agility: they help us understand better, react faster, and execute with greater precision. They do not replace judgment, but they do elevate decision-making capacity and operational speed when well-integrated.”

Miriam Mendoza, Director of Communications
NESTLÉ MÉXICO

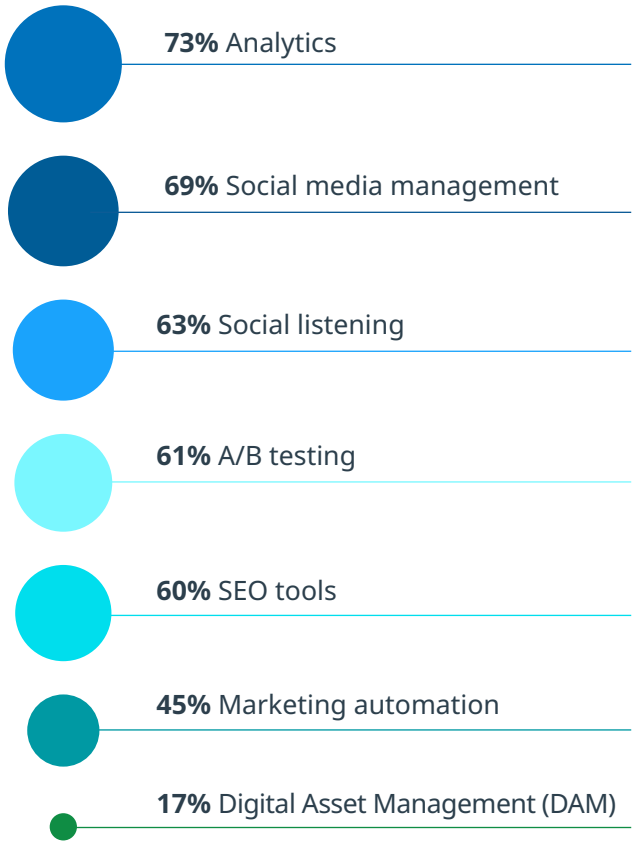
3.3.2 Tools for activation/operation (analytics, automation, listening, etc.)

Although the previous section shows that the activation and operation stack is relatively consolidated in measurement and daily management, research indicates that it is less consistent when it comes to automating and organizing assets.

The most widespread tools are analytics and social media management. Added to this is an already majority block of optimization capabilities: social listening, A/B testing, and SEO tools.

The boundary of operational maturity appears in marketing automation and, further behind, DAM. In short, organizations measure and optimize more than they automate and standardize asset management.

Tools ecosystem: from measurement to automation



In countries where the technology inventory becomes more "performance-ready," the differentiator lies in automation and experimentation. For example, Brazil stands out for an operation more geared toward execution and scaling, with 78% of companies utilizing marketing automation.

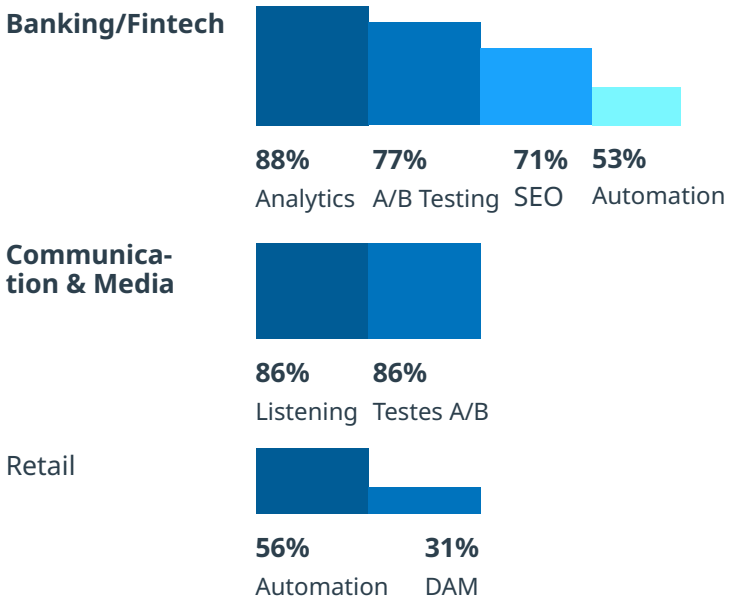
Mexico also ranks above the regional standard in optimization and experimentation capabilities, particularly in A**/B testing (86%) and analytics (81%), and additionally shows automation at 54%**, enabling better conditions to scale journeys and efficiency.

The industry-level analysis reveals clear specialization patterns. **Banking/Fintech** operates with a stack more geared toward measurement and performance.

In the case of **Communication & Media**, it stands out for its intensive use of social listening and A/B testing, consistent with content dynamics and continuous adjustments.

Retail excels when looking at scalable operations with automation and a greater presence of DAM, aligned with the need to organize assets and sustain continuous activation.

Technological specialization by highlighted industries:

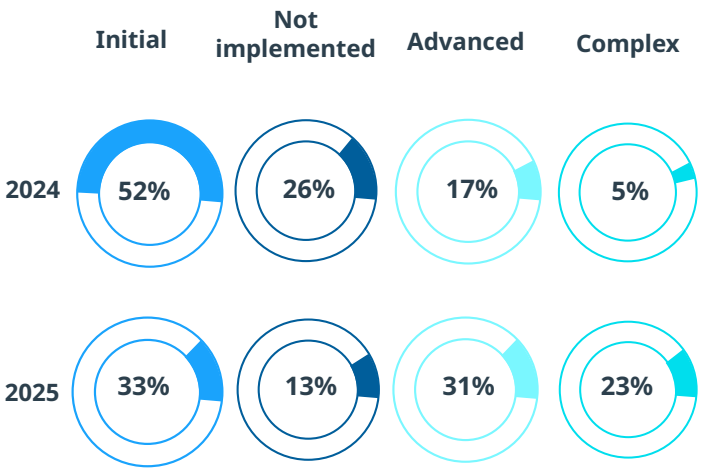


In business models, **B2B2C** again shows the most complete mix (above average in analytics, listening, SEO, and automation), while **B2B** tends to concentrate on the basics (e.g., SEO around one-third and analytics near half), which usually translates to lower systematic optimization capacity and less automation.

3.3.3 Level of Implementation of Marketing Automation

While the report finds that in the region **77% of organizations declare some degree of marketing automation implementation**, the figures indicate a transition.

Marketing automation implementation



What best explains the gap is not intention, but implementation conditions. Mature automation grows when the infrastructure to support it exists, because when data infrastructure is analyzed alongside automation levels, the presence of a CDP is associated with, advanced or complex automation becomes significantly more frequent, reaching 75 percent of companies.

However, for firms that report having no customer data tools, mature automation drops to marginal levels of 12 percent.

This reinforces the central takeaway of the module: without data integration, automation tends to remain trapped in isolated efforts that are difficult to scale and sustain.

This logic becomes even more evident when looking at the small and medium-sized enterprise (SME) segment. The digital maturity study highlights that although digital technologies "lower" the efficient scale of operation, **SMEs only capture the benefit if they possess the internal capabilities to adopt and leverage those technologies**.

Thus, maturity depends on a set of conditions (infrastructure, skills, financing, culture, and internal resources) that are not always in place.

In practice, this drives incremental adoption—that is, establishing basic tools first, followed by more complex layers (ERP, Big Data, Cloud)—with a gap that widens as technological complexity increases.

Even with the forced "leap" brought on by the pandemic—nearly 70% of SMEs reported increased use of digital technologies—the bottleneck has not disappeared. As channels and tools proliferate, critical gaps persist (e.g., cybersecurity) alongside, above all, the capacity to sustain processes over time.

From a CRM perspective (and its direct link to automation), empirical B2B research across ten Latin American countries shows that **the majority of surveyed firms are SMEs (68.8%)**, making it especially crucial to view automation as a "capability" rather than a mere ‘software license’.

Within this framework, Customer Relationship Management Capabilities (CRMC) are understood as integrating IT assets (e.g., Sales Force Automation (SFA)/CRM) with organizational routines and skills; and operating through concrete practices such as having management applications (SFA/CRM), systematic training in CRM techniques, satisfaction surveys, standardized methodologies for customer recovery, and acquisition protocols.

NTT DATA & Tangity — Insights

That is why, in SMEs, the conversation around marketing automation is rarely "what tool should I buy," but rather "how ready is my operating system to automate."

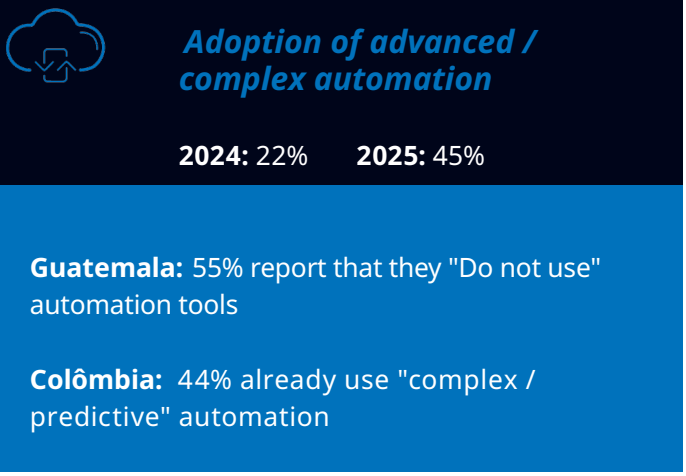
The same study shows that CRM capabilities enable Marketing–Sales collaboration and relationship maintenance, but it also clarifies a key nuance: ***technology alone does not guarantee results****; value emerges when combined with human and organizational resources, precisely when collaboration and relationship maintenance are present as necessary conditions for performance.*

Extremes are also observed by country and industry. Guatemala has the highest share of organizations not using automation, while Colombia stands out for a high share of complex/predictive automation.

By sector, Retail shows a higher presence of complex automation (38%), while Banking/Fintech concentrates more organizations in the initial phase (47%), with a lower proportion that "does not use" (12%). This suggests a larger installed base, although part of the market is still in the scaling phase.

Compared with 2024, the contrast is significant. In the previous report, CRM appeared as a much more widespread standard (82%) and automation was concentrated in the exploratory phase, with 52% starting.

The current findings point to a higher standard of maturity: "having a CRM" as a base statement falls (suggesting greater regional heterogeneity) and, at the same time, the relative weight of advanced/complex automation increases (from 22% in 2024 to 45% the following year), signaling that when data and operations are successfully integrated, automation is moving beyond experimentation and becoming an operational practice.



For SMEs in Latin America, **CRM automation usually progresses when four structural friction points are resolved: talent/training, infrastructure, organizational culture, and access to financing.**

In this context, the "leap" to mature marketing automation depends less on adding features and more on consolidating core baseline capabilities, such as a CRM/SFA genuinely used by Sales and Marketing, data capture and quality discipline, actionable segmentation, and standardized routines (acquisition, recovery, satisfaction, and training).

When these foundations are in place, SMEs can move from isolated workflows to scalable automation (nurturing, follow-up, retention) with tangible impact. Otherwise, automation tends to remain restricted to "per-campaign" efforts and becomes fragile in the face of staff turnover, shifting priorities, and a lack of integration.

Practical Implications

For marketing and commerce leaders, the priority is not to add tools, but to close the integration gap. Specifically, three lines of action are suggested:

01.

Ensure a minimum integration foundation (before scaling).

Define a minimum data architecture: what sources enter, who governs, how they are unified, and what is the "single source of truth" for audiences and performance. From there, establish the operating model that connects CRM/CDP/data lake with activation in media and owned channels.

02.

Capture efficiency with automation where a base already exists.

In the short term, focus automation on what truly scales: journeys, nurturing, and personalizing based on reliable signals. Avoid automating processes that lack consistent data or clear rules.

03.

Professionalize the operation with testing and measurement discipline.

Install routines for continuous experimentation (tests) and consistent metrics to learn and optimize. Without this discipline, "sophistication" remains a promise and does not turn into productivity.

RISK TO AVOID: investing in automation layers, AI, or personalization without first resolving data tracking and integration. Doing so typically inflates operating costs, fragments audiences, and hinders scalability.



3.4 Measurement and analytics

Metrics monitoring and analysis form the ‘nervous system’ of digital marketing because they turn any activity (campaigns, content, audiences) into decisions (where to invest, what to optimize, what to stop).

In Latin America, **the critical point is not just measuring, but connecting that measurement with business objectives**, resolving data processing gaps, and professionalizing attribution in an environment where performance coexists with brand building and increasingly multichannel journeys.

> “The real question is not just 'what happened,' but 'what value was contributed' by each effort. The industry needs to evolve toward measurements that help understand incremental impact.”
>
> **Pablo Rada, Media Director, HEINEKEN MÉXICO**

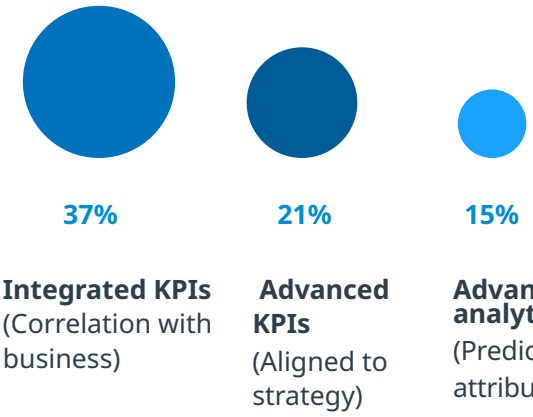
In this module, the focus is on understanding how mature the metrics discipline is (KPIs and reporting), how prepared the database is (processing), how actionable the monitoring is (optimization), and how robust the attribution is (MMM/MTA/incrementality).

3.4.1 Maturity of KPIs and reporting

In the countries analyzed, measurement is an established practice among companies; however, two realities coexist in parallel.

On one hand, around 3 out of 10 organizations still operate with limited capabilities and isolated reports per channel. Others have already reached a stage where KPIs are no longer purely tactical.

Compared with the 2024 benchmark, a material improvement is observed because advanced analytics is gaining ground, moving from 6 to 15 percent.



An important sign of maturity (and tension) appears when looking at the "language" used with executive management: **47% still measure effectiveness as tactical metrics per channel** without correlation to business KPIs, while **46% already operate with unified dashboards** that combine marketing metrics with financial/strategic KPIs for companies.

Although a minority—barely 7%—reaches a level where metrics translate into channel-by-channel contribution to indicators like EBITDA (earnings before interest, taxes, depreciation, and amortization) or market share, this shows that while the region is making progress in integrated reporting, it still struggles to translate these capabilities into business-contribution measurement.

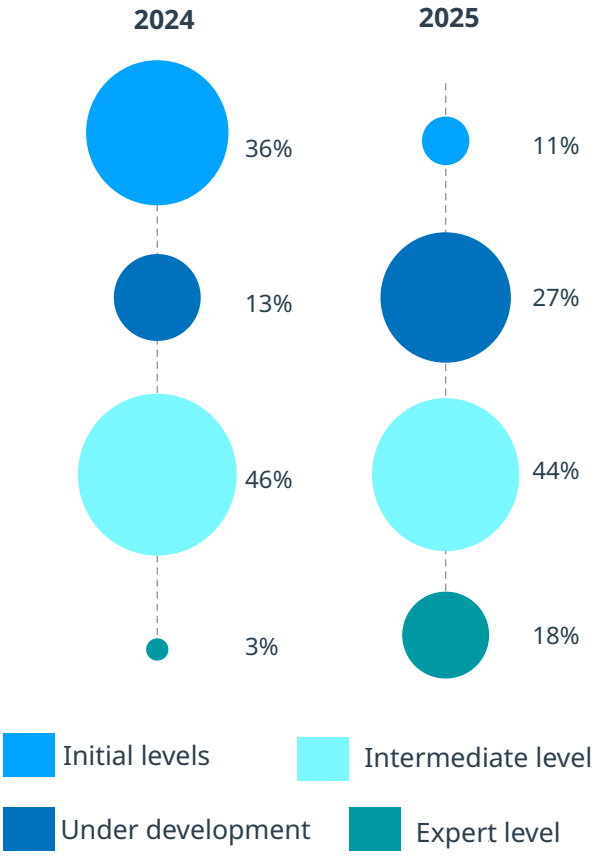
3.4.2 Data processing

When it comes to data management—spanning capture, storage, governance, and quality-based selection—the recurring pattern is built around advanced core infrastructures.

Regionally, nearly half of organizations operate at an intermediate level, maintaining a constant data flow and using analytics for decision-making, albeit without advanced analytical processes. The remainder are in the development stage, others operate at an expert level (advanced processes and personalized workflows), and a smaller percentage remains at a basic level (initial collection and storage).

Compared with the 2024 study, the shift is clear: the share of organizations at the expert level increased over the past year, while the early-stage segment decreased significantly.

Evolution of data processing

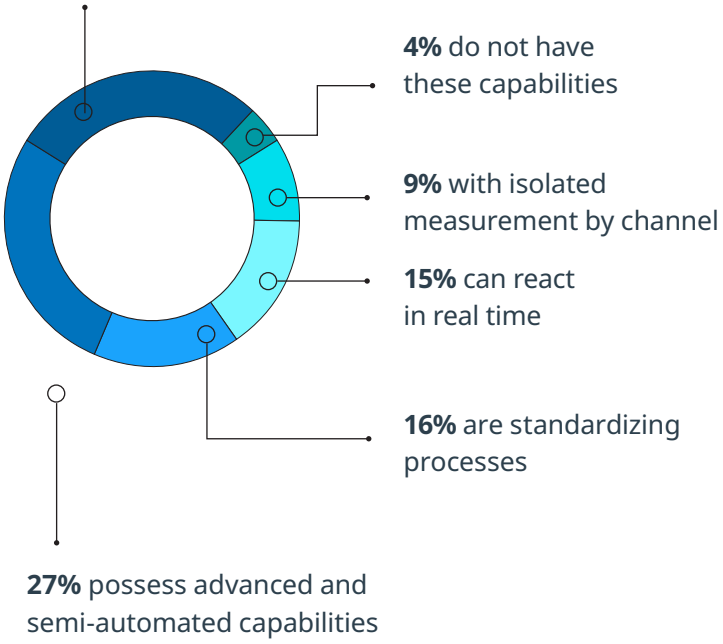


This aligns with the digital maturity framework because to scale across analytics and automation concepts, the bottleneck typically lies in digitizing, cleaning (filtering based on quality), and structuring data, as well as consolidating it—for example, into data hubs—and developing internal capabilities for interpretation to avoid the illusion of having a vast amount of data with no real practical use.

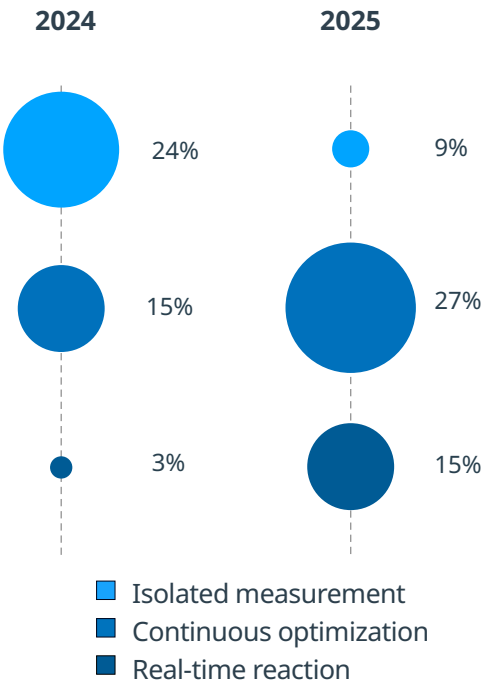
3.4.3 Measurement and campaign optimization

In data monitoring and optimization, the most relevant finding for this study is the growth of more actionable measurement capabilities. Today, nearly a third of companies have tools with medium cross-channel integration; while others already possess advanced and semi-automated capabilities, or can react in real time to campaign performance.

The flip side of the coin is that 16% of companies mention they are currently standardizing processes; others continue with isolated measurements per channel, and a smaller fraction lacks these capabilities altogether.



Compared to 2024, the acceleration is strong: isolated measurement drops while levels that enable continuous optimization rise, such as semi-automated processes, and real-time reaction, which jumps from 3 to 15 percent.

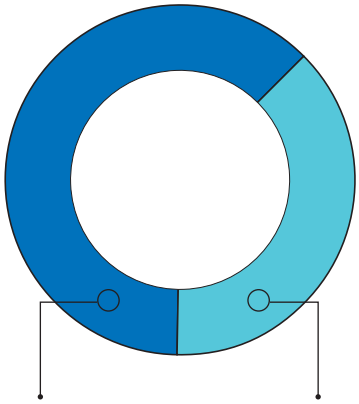


In operational terms, the result suggests that the market is shifting from reporting performance to managing it through more frequent cadences and greater integration within campaigns.



3.4.4 Attribution/measurement methods

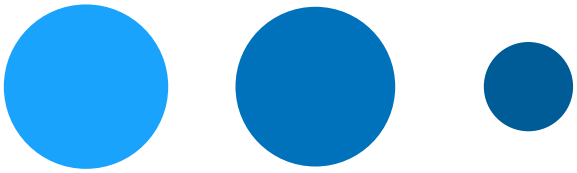
What is observed in attribution methodology is a mixed scenario: **37%** report having no formal method (relying on empirical assignment), but more than half already use at least one formal approach. In terms of adoption by technique (multi-selection question), MMM, MTA, and *incrementality testing* emerge.



62% Uses at least one formal approach

37% Has no formal method

Adoption by technique:



35% MMM
Marketing Mix Modeling (MMM)

34% MTA
Multi-Touch Attribution

19%
Incrementality testing

The key insight is not just which method to use, but the gap between adoption and strategic use. So far, the Latin American region is adopting these models, but many media investment decisions are still based on heuristics.

At this point, there is an enabling condition that often goes unnoticed: effective access to campaign data—especially in Paid Media.

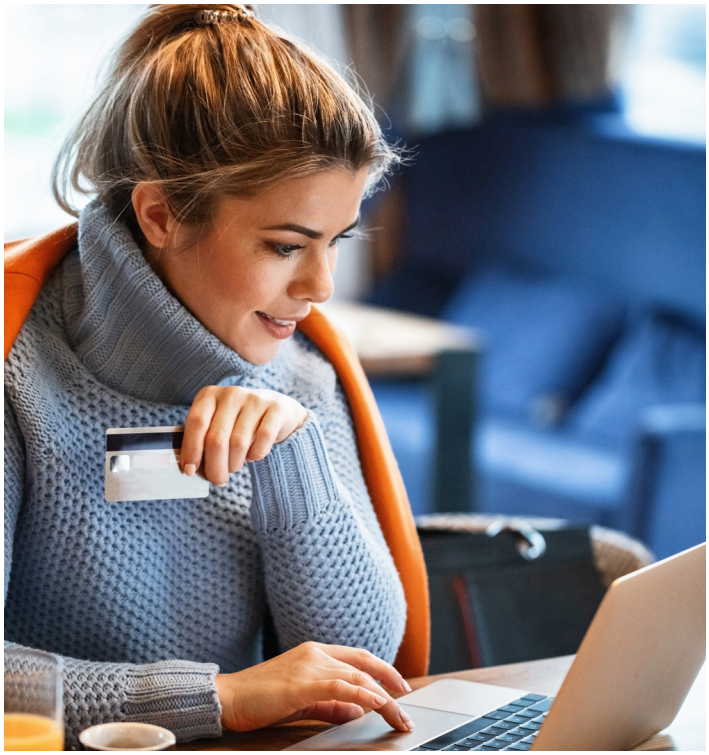
When operations are left in the hands of third parties (agencies, partners, platforms) and companies do not ensure they are provided with access, costs, impressions, audiences, creatives, and results at the necessary level of detail, they lose access to the first-party campaign data needed to make investment traceable.

Without that base consolidated, governed, and internally available, models (including MMM) are built on incomplete or aggregated information, limiting the ability to estimate incremental impact and optimize a budget with comparable criteria across channels and partners.

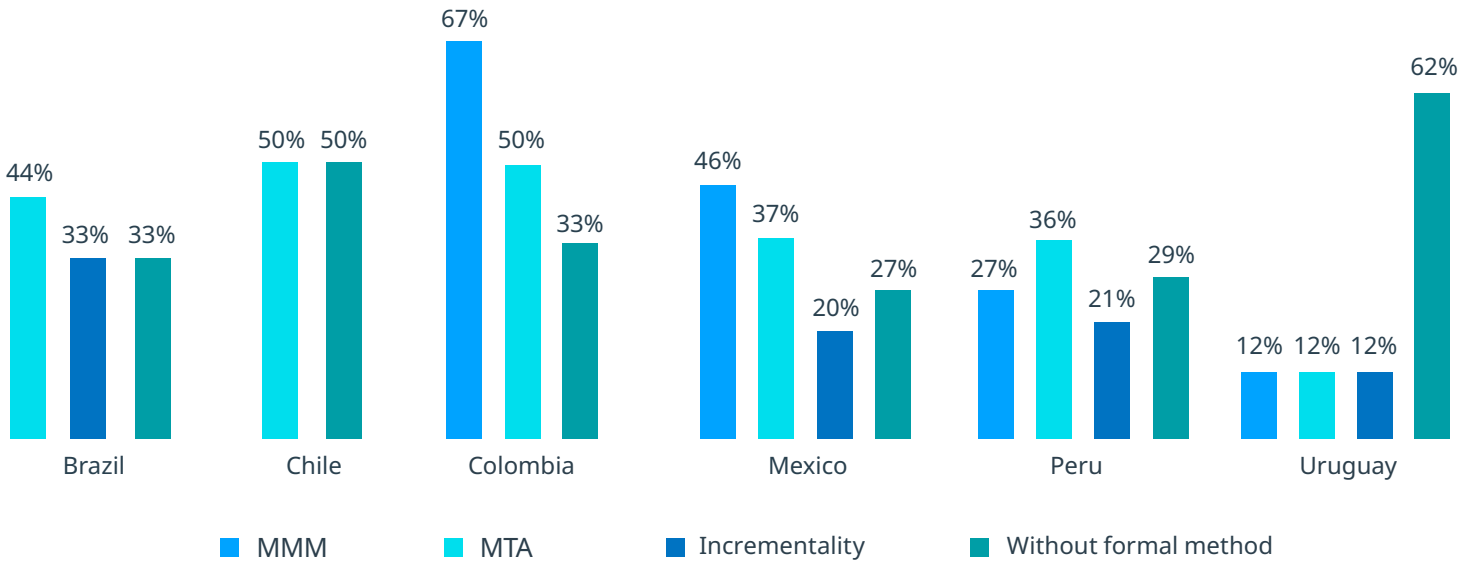
Data highlights by industries, business models and countries:

Industries: Retail and Banking/Fintech push operational maturity. In KPIs and reporting, the proportion at high levels exceeds 50 percent in both cases. In campaign measurement/optimization, these industries also lead high levels. In attribution, Banking/Fintech differentiates itself through strong adoption of MTA and less absence of a formal method; while Retail shows a more hybrid pattern due to a greater absence of method, but more relative presence of incrementality and MMM.

Business Models: B2B2C tends toward greater integration with high levels of KPIs and a stronger mid+ in processing. In attribution, B2B2C relies more on MMM, while for B2B the proportion without a formal method rises, a sign that a gap exists between commercial complexity and measurement discipline.



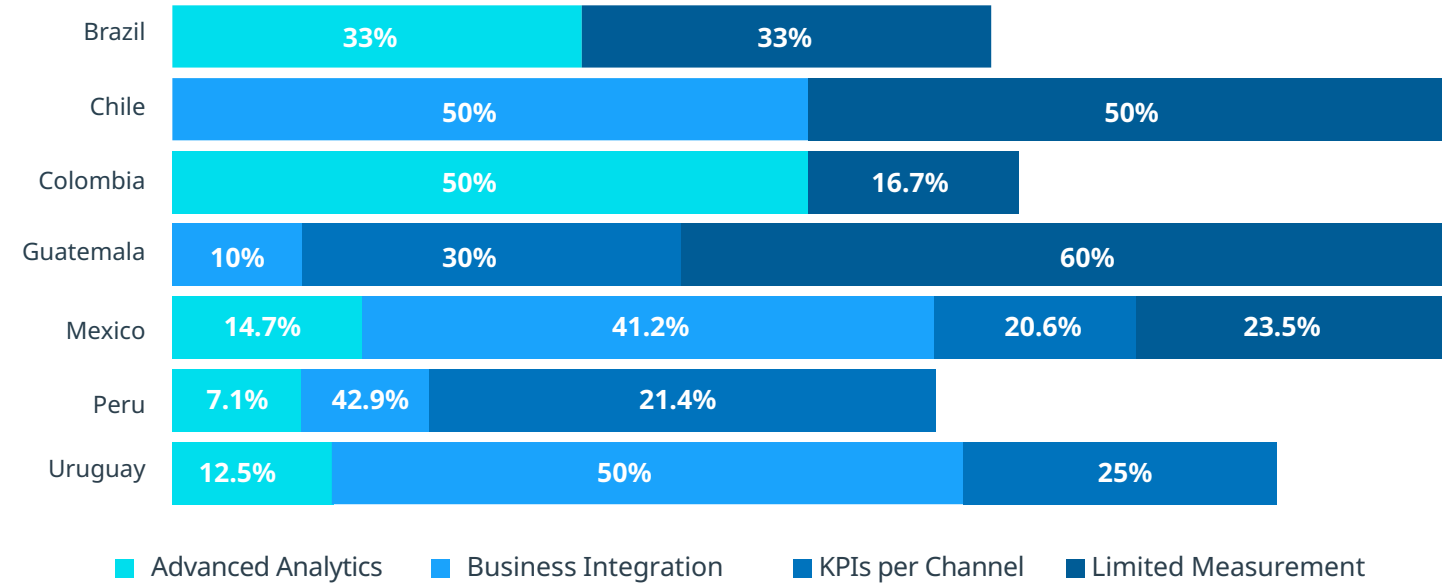
Adoption level of attribution models:



Countries: The differences are particularly clear in Guatemala, which lags behind in KPIs and attribution: only a small percentage reaches high KPI maturity levels, while more than half lack a formal attribution method.

Brazil stands out for expert maturity in data processing. Uruguay also shows a significant gap in attribution formalization, as a large share of organizations lack a formal method.

Measurement capabilities by country:





Practical implications

The opportunity for marketing and commerce leaders is not to add more dashboards, but to close the data–decision–action–learning loop. In practice, this translates into five clear action points:

01.

Standardize KPIs (and their "translation" to business).

Define a single taxonomy of KPIs by funnel and channel, and map each KPI to business results (revenue, profit margin, customer retention, share).

02.

Prioritize data quality and governance over volume.

Assign ownership, quality rules, "single source of truth" sources, and reconciliation processes.

03.

Operate with integrated optimization cadences.

Move from isolated channel-by-channel optimizations to weekly/biweekly routines that review the performance of the complete mix.

04.

Professionalize investment allocation with complementary methods.

Combine approaches according to the type of decision: MMM for macro vision and trade-offs, MTA for more granular digital reading, and incrementality to validate causality and sustain decisions before executive management.

05.

Reduce vanity metrics and align Marketing-Sales.

Lower dependence on CTR/CPL as "success" and agree on shared indicators (conversion, revenue, margin, LTV).



3.5 Campaigns and Channels

Another major takeaway to emphasize in this study on the Evolution of Digital Marketing in Latin America is that "multichannel," beyond being a tactical choice, becomes the baseline requirement to compete in increasingly fragmented journeys, as customers combine channels, devices, and purchasing touchpoints.

The real challenge has shifted from "being present across many channels" to orchestration—meaning aligning objectives, integrating operations, and sustaining an effectiveness/ROI narrative that keeps executive leadership engaged in the conversation.

> “Brand content must be practical, realistic, and culturally relatable; not hollow aspirational filler. Useful content is what delivers results.”
>
> **Jorge Ramos,** CEO, **LA COSTEÑA**

In this context, the pressure for results becomes more complex because most organizations declare strategies spanning more than one stage of the funnel: 64.1% operate with full-funnel objectives, while narrow approaches (only awareness or only conversion) appear with 13.0% each.

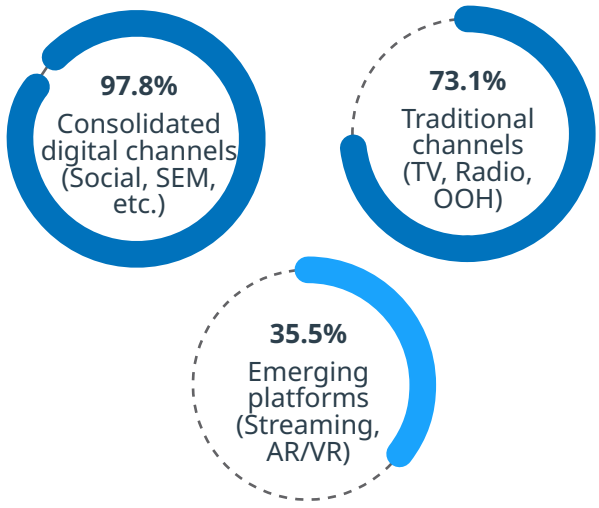
This naturally leads to a broader channel mix and, at the same time, raises the standard for integration and measurement.



3.5.1 Channel Mix and Objectives

Digital channels form the foundation of the channel mix; however, it coexists with a still-high weight of traditional media and a selective adoption of emerging platforms.

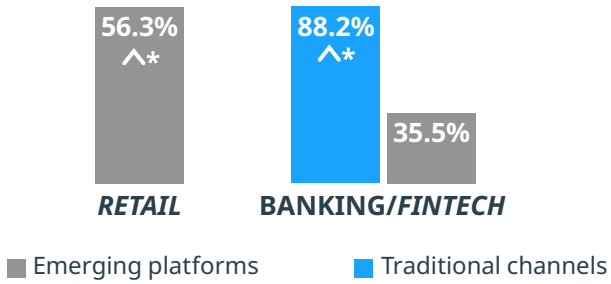
Global channel mix:



The result is greater friction as the mix expands, making consistent objectives and KPIs increasingly critical.

The standout pattern is that Retail shows a clear trend toward experimentation, as it is one of the sectors with the highest observed use of emerging platforms—defined as newer or fast-adopting digital channels and ecosystems, such as Retail media, CTV/streaming with programmatic buying, digital audio, gaming/in-game, and creators/short-video.

Channel mix by industry



Note: Highlighted channels (*) are above the regional average (35% in emerging platforms and 73.1% in traditional channels).

In contrast, **Banking/Fintech** maintains a media strategy heavily anchored in traditional platforms and a more moderate integration of emerging ones.

By business model, **B2C** and **multi-model** organizations tend to operate a broader combination of platforms, maintaining a presence in both traditional and emerging channels. **B2B** exhibits lower reliance on traditional channels and a lower percentage of emerging ones, suggesting more focused objectives and distinct decision-making cycles.

3.5.2 Multichannel/Omnichannel Integration

Based on the study's conclusions, the real challenge is not opening more channels, but rather enabling them to work together in an integrated manner.

In 2025, most companies still operate within a "multichannel with alignment" scheme rather than full omnichannel: 51.6% operate with a multichannel strategy but with unified objectives and cross-functional KPIs.

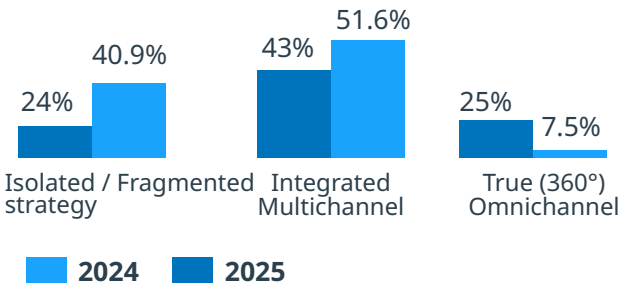
On the other hand, only 7.5% affirm having an omnichannel approach with deep integration and a centralized 360° reporting system. At the same time, operational fragmentation remains evident: 21.5% manage campaigns independently by channel (although with a common general objective) and 19.4% coordinate actions from marketing without solid operational integration.

> “Omnichannel is not about 'being in multiple channels'; it is about designing a coherent experience where the customer experiences no friction. When executed well, it strengthens relationships and builds loyalty.”
>
> **Rodrigo Zedillo, Director of Digital Strategy and AI, EL PALACIO DE HIERRO**

To interpret the contrast with 2025, it is useful to review how omnichannel was defined in 2024. In that year, 43% of companies were in the category "customer view integrating all digital channels" and 25% in "omnichannel experience strategy".

Omnichannel is described as integrating the digital experience with physical and traditional channels, meaning a vision centered on customer experience coherence.

Evolution of omnichannel maturity in Latin America



By 2025, as requirements shift toward deep operational integration and centralized 360° reporting, the proportion of companies meeting this strict standard dropped to single digits. While this looks like a regression at first glance, it actually reveals that "true" omnichannel execution—combining technological, operational, and analytical integration—presents a significantly higher barrier to entry than simply adopting omnichannel as a customer experience principle.

Country-level metrics already showed heterogeneity in 2024: Mexico stood out for omnichannel adoption, whereas Chile reported zero omnichannel adoption. By 2025, the vision for omnichannel evolved past e-commerce toward comprehensive user understanding and end-to-end traceability to back investment decisions. However, this ambition clashes directly with fragmented tech stacks and non-unified measurement.

At the industry extremes, **Retail** and **Banking/Fintech** show the clearest signals of deep omnichannel integration. Geographically, the strongest indicators of highly integrated omnichannel strategies appear in **Mexico** and **Colombia**, though they remain a minority overall.



The omnichannel vision is expanding beyond e-commerce into holistic user understanding and end-to-end traceability for investment decisions. Yet, fragmented tech stacks and non-unified measurement remain the primary bottlenecks.

The market is undergoing a transition toward an omnichannel standard that demands high-level operational and analytical integration. Because this stricter criterion raises the barrier to entry, it highlights a persistent gap between executive strategy and actual execution capabilities.

3.5.3 Effectiveness measurement and ROI for executive management

Measurement serves as the critical bottleneck that dictates whether multichannel strategies scale or remain trapped in organizational silos. In 2025, clear polarization emerges across the analyzed companies: a major segment evaluates performance using isolated channel metrics without clear ties to business outcomes, whereas **45.9%** utilize unified dashboards that bridge marketing performance with financial or strategic KPIs.

Effectiveness measurement for senior management



47.1%	45.9%	7.1%
Tactical channel metrics (CTR, CPL, etc.)	**Unified dashboard** (Marketing + Finance)	**Advanced attribution** (EBITDA / Market share)

The most demanding tier—advanced attribution reflecting per-channel contribution to EBITDA or market share—remains a niche capability.

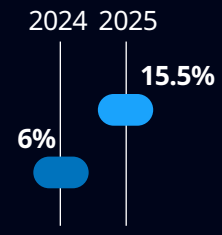
Examining concrete methodologies used to estimate effectiveness, attribute results, and defend ROI before executive leadership (such as econometric modeling, multi-touch attribution, or experimentation) highlights a core operational tension: **36.5%** of organizations report having no formal method.

Measurement methods

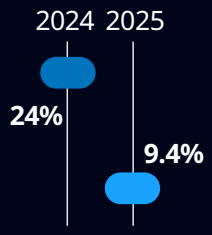


No formal method	Marketing Mix Modeling (MMM)	Multi-touch Attribution (MTA)	Incrementality testing

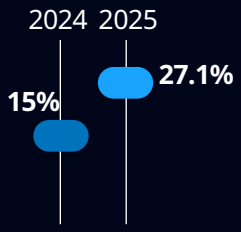
Measurement evolution: Toward more actionable capabilities



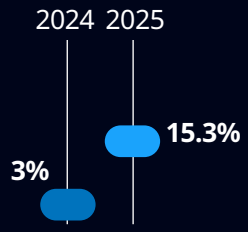
Use of advanced analytics models



Campaign monitoring, measurement, or optimization



Advanced / semi-automated capability



Real-time reaction

In parallel, structured approaches such as **Marketing Mix Modeling (MMM) and Multi-touch Attribution (MTA)** coexist, while incrementality testing—a key element for justifying investments to executive leadership—remains lagging. This gap explains why many organizations can "optimize on a per-channel basis" yet still struggle to demonstrate the aggregated impact of their entire media mix.

However, the comparison with 2024 highlights a material shift in enabling capabilities. In **KPI measurement**, the adoption of advanced analytics (predictive, prescriptive, or attribution models) nearly tripled, increasing by a factor of 2.6x.

In campaign monitoring, measurement, and optimization, isolated metrics have dropped by more than half; on the other hand, advanced/semi-automated capabilities nearly double, and "real-time" reaction quintuples.

While the improvement in these operational practices is clear, it does not yet translate on a large scale into a defensible ROI at the executive level because attribution to core business outcomes remains fragmented.

3.5.4 Personalization by channel

Content personalization is advancing, but primarily at "controllable" levels such as behavioral segmentation, while dynamic execution in real time remains rare.

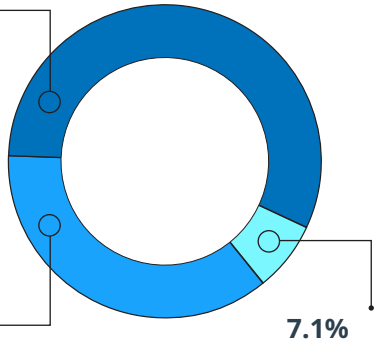
In 2025, more than half of companies personalize content based on behavioral and purchase data, while 3 out of 10 limit themselves to basic demographic-type personalization. To a lesser extent, organizations have managed to integrate *AI automation* to deliver individualized experiences in real time.

In the **Retail** sector, a more advanced signal of this real-time *AI automation* level is observed, with 13.3% of companies adopting it.

Compared to 2024—when similar constraints were visible, with only **8%** reporting the capability to combine annual planning with hyper-personalized, automated, *on-demand* campaigns centered around customer vision—the figure remains at a similar level.

Consequently, personalization at scale depends on data quality, campaign integration, and end-to-end traceability; without these core foundations, what grows is segmentation, not true dynamic personalization.

Maturity in personalization



56.5%
Segmentation by behavior and purchase (intermediate level)

36.5%
Basic / demographic personalization (initial level)

7.1%
AI Automation / Real-time (advanced level)





Practical Implications

For marketing and commerce leaders, the takeaway is clear: while a multichannel mix has been achieved, competitive differentiation now hinges on deep integration combined with executive-level measurement. Consequently, setting the following priorities is recommended:

01.

Define a reduced set of cross-functional KPIs (by business objective) and standardize nomenclatures and sources.

02.

Shift the conversation with executive management from tactical metrics toward the incremental impact of the mix.

03.

Close operation gaps with centralized reporting and data governance to sustain "real" omnichannel.

04.

In personalization, move from segmentation to activation: use AI automation for dynamic experiences only where there is sufficient data tracking and quality.

3.6 Artificial Intelligence

AI emerges in the study findings across Latin America as an already established capability within day-to-day marketing practices, though at vastly different levels of depth. Surface-level applications (copilots and content generation) coexist alongside more structural initiatives (automation, predictive models, and autonomous agents).

The clearest shift compared to 2024 is that the group of organizations reporting "no implementation" is no longer a massive majority—with only 4% declaring it is not a budgetary priority for 2025. This confirms that **the core conversation is no longer about whether to adopt AI, but rather *what* to use it for, *how* to govern it, and *how* to measure its impact.**

3.6.1 Priority and investment

In practice, AI adoption has outpaced formal budget allocation. While overall usage is increasing, spending is frequently diluted or reclassified under other budget line items (such as technology, training, or cross-functional projects), meaning dedicated AI investment has not yet emerged as a fully distinct and consistent line item.

The data indicates that AI investment remains at a modest level within the broader marketing budget, as more than half of companies report allocating less than a third of their budget to AI-driven initiatives.

A key difference emerges across business models. **B2B2C** organizations (hybrid operations) show a greater concentration of budgets in the mid-to-high ranges, with nearly half reporting allocations of around 31%, while B2B and **B2C/D2C** organizations tend to be more concentrated in the lower-priority tiers.

At the country level, **Brazil** and **Colombia** show a higher incidence of medium/high priority, whereas Uruguay is concentrated more in lower ranges.

By industry, Banking/Fintech tends to push toward medium/high priority relative to the average, consistent with an agenda where AI is already impacting acquisition, customer service, and efficiency processes.



3.6.2 Governance and cross-department collaboration

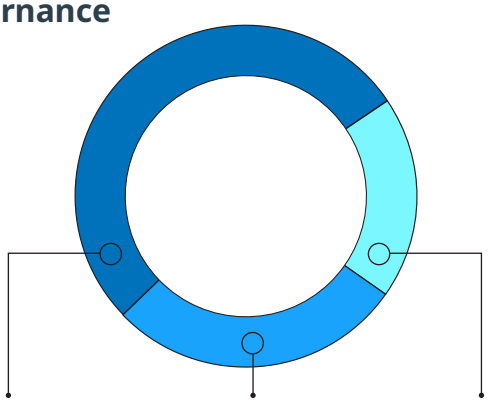
The Latin American region shows a "breaking point" in governance: **53%** Formal governance (multidisciplinary teams, agile committees/cells, or dedicated office). **28%** Without established collaboration (silos / each area on its own). **19%** Ad hoc coordination (without a formal process).

In other words, half of the organizations have already built the structure, while the rest remain exposed to fragmentation, duplication of effort, and operational risk.

The most consistent pattern emerges by business model: **B2B2C** registers the highest level of formalization, which aligns with business needs where value creation depends on integrating marketing, sales, IT, product, data, and channel partners.

By industry, **Retail** stands out with the highest formal governance (nearly 7 out of 10), whereas formalization is lower in **Banking/Fintech** and **Communication & Media**, where it coexists with internal fragmentation.

Governance



53%
Formal governance
(Multidisciplinary teams/committees)

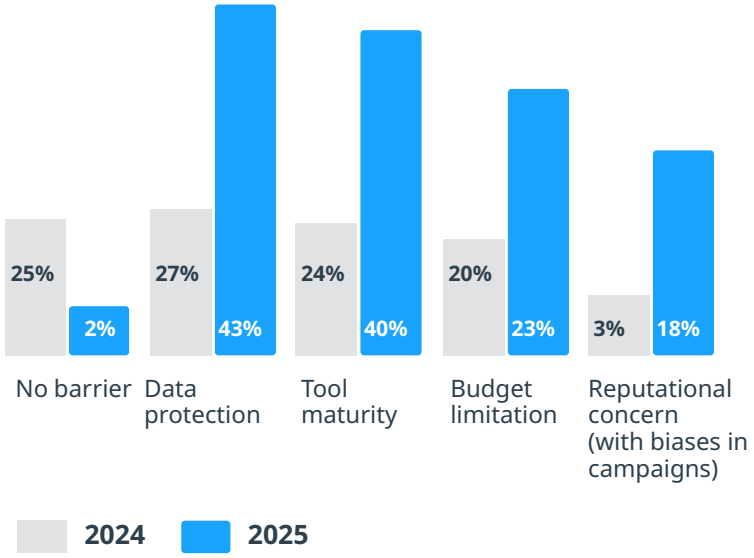
28%
No established collaboration
(Silos/each department operating independently)

19%
Ad hoc coordination
(Without a formal process)

3.6.3 Challenges for Artificial Intelligence adoption

Data from the study reveals that the dominant barriers to AI adoption are no longer "curiosity or lack of budget," but rather risk and capability. Companies cite key challenges such as data protection and confidential information, the maturity of tools, and a shortage of specialized talent. Further down the list are a lack of clear strategy and budget constraints.

Main barriers to AI adoption



This profile is important because it marks a transition: **the problem is no longer "getting started" with artificial intelligence, but rather scaling without compromising compliance, quality, and operations.**

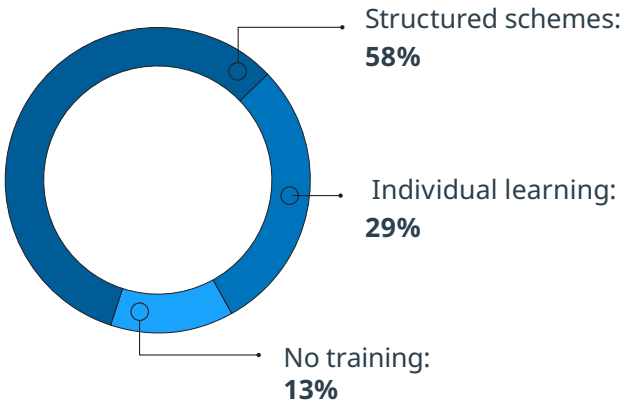
A clear evolution compared to 2024 is visible here. In the previous study, twenty-five percent reported having no concerns or limitations, and reputational concern was marginal; as for data protection and tool maturity, both stood below thirty percent.

In 2025, "no barriers" practically disappears and reputational concern increases—a sign of a market that is more conscious of biases, brand exposure, and operational risks in production and customer service.

3.6.4 Training and talent

Organizations are increasingly formalizing AI readiness among employees, but it remains an uneven capability across organizations. Data indicates that more than half rely on structured schemes—such as internal development plans, expert workshops, or specialized roles; nearly one-third rely on self-directed learning ("each employee learns on their own"); and 13% have conducted no training.

Employee training



The key takeaway on workforce development is that progress is being made, yet a broad base of organizations still utilizes **AI without a consistent skills development roadmap.**

A significant shift is evident when compared to the previous study, where only **14%** reported investing in training and **36%** relied on autonomous learning. In 2025, momentum shifted toward internal plans and workshops, although self-taught learning remains a substantial component.

By business model, **B2B2C** stands out with the highest prevalence of internal plans (nearly half), whereas **B2C/D2C** concentrates higher levels of self-directed learning and a larger proportion with no formal training.

This ties directly back to the adoption challenges: **where talent is lacking, AI adoption tends to stay confined to tactical uses.**

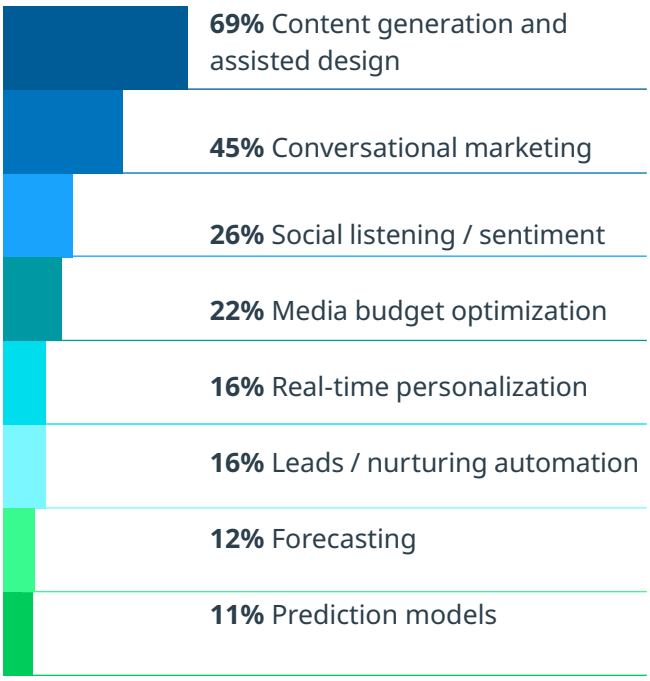
3.6.5 Priority use cases

Artificial Intelligence is primarily deployed where it accelerates production and reduces internal friction within organizations. In marketing, the dominant use case is **content generation and assisted design,** followed by c**onversational marketing.**

Next comes a tier that marks the transition toward resource optimization: **social listening/sentiment analysis, media budget optimization**, and at a similar level, **real-time personalization and lead nurturing/automation**.

More analytical applications (*forecasting* and propensity/attribution/predictive models) remain a minority, though they are now emerging on the roadmap.

Priority AI use cases



In 2024, AI adoption was primarily concentrated in creativity/consultation (**40% content generation and 40% ideation**), conversational AI was lower, and a large segment reported no implementation at all. For the current edition, the center of gravity has shifted: generative AI has become standard (**text tools at 75% and design at 53%**), conversational AI has gained significant traction, and new use cases in campaign optimization (media, social listening, personalization) are opening up.

The most notable industry differences align closely with each business model:

Banking/Fintech pushes conversational use cases hardest (over half prioritize it) and demonstrates a higher presence of analytical and lead-nurturing applications.

Retail stands out with a higher incidence of real-time personalization (one-third prioritize it), aligning with constant pressure to drive conversions, increase average basket sizes, and repeat purchases.

Communication & Media, by contrast, shows a sharp rise in media budget optimization (nearly half prioritize it), reflecting a core focus on media efficiency and performance.

> “The biggest pending challenge is not 'creating content pieces,' but applying AI to data and decision-making: management, forecasting, and time efficiency to make better and faster decisions.”

Oswaldo Castro, Marketing Director
VOLKSWAGEN MÉXICO

In digital commerce, reported applications align with these trends: product recommendation engines, chatbots, automated content generation, advanced segmentation, and forecasting emerge as the most common areas of application.



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We could not close this chapter without highlighting one of the most discussed trends in recent months, where leading companies are moving beyond simple content generation to tackle comprehensive "content supply chain" initiatives powered by AI.

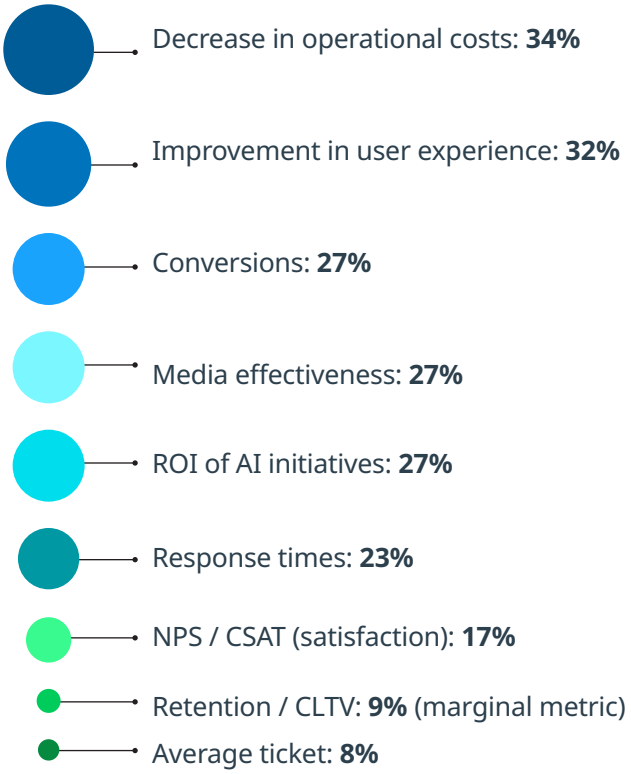
These initiatives automate the entire end-to-end workflow: from briefing and multi-format adaptation to compliance control, automatic tagging in DAM (Digital Asset Management), and dynamic activation by audience. AI does not merely accelerate production; it industrializes consistency, scalability, and time-to-market.

3.6.6 Success/ROI metrics

Corporate measurement of AI effectiveness is currently being built around efficiency and user experience rather than long-term value generation. The most widely used metrics are operational cost reduction and improved user experience.

Following those, with equal weight, are conversion rates, media effectiveness, and AI initiative ROI, followed by response times and NPS (Net Promoter Score) / CSAT (Customer Satisfaction Score).

AI Measurement



Metrics like retention/CLTV (Customer Lifetime Value) and average order value remain marginal, reported by only 9% and 8% of companies, respectively, suggesting that many organizations are measuring immediate impact, but not necessarily incrementality or sustained value.

By business model, the difference is clear: B2B focuses on efficiency (costs) and rarely cites conversion as a primary metric, whereas B2C/D2C measures more by conversions/selling more.

B2B2C tends to concentrate more ROI indicators and media effectiveness, consistent with operations where AI is used to optimize spending and results across complex ecosystems.

By industry, Banking/Fintech shows a greater focus on experience and response times; Retail places greater emphasis on media effectiveness and, comparatively, in repeat purchases/loyalty.

Reflections and practical implications (AI and agents)

AI is already being used in the daily operations of organizations in Latin America, but it does not yet scale consistently: 31% of organizations still report not using any intelligent agents, while first-generation use cases remain focused on volume and efficiency (customer service, repetitive tasks, internal operations, content) At the same time, a group of organizations is already taking the next step toward building proprietary capabilities, with 20% developing customized agents.

The difference between accumulating proofs of concept and achieving real impact is usually defined even before deciding on the technology to be used: in the clarity and quality of the use-case definition, and in whether it is cross-functional—that is, impacting business metrics, departments, and end-to-end processes—or remains restricted to boosting individual productivity within an isolated team.

Use of intelligent agents:



38% Automated customer service

32% Automation of repetitive tasks

32% Internal operations

30% Large-scale content generation

31% Do not use any intelligent agent yet

20% Already developing personalized owned agents

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In this section, it would be relevant to look at what is happening in advanced environments, where agentic AI platform developments are already participating in campaign optimization, automated journey validation, audience management, dynamic pricing, or catalog updates.

Under frameworks of control and traceability, these agents make it possible to scale operational efficiency without losing governance or strategic visibility.

Clear actionables to scale

01.

Define agent use cases with an owner and the business KPI.

Each agent must have an owner and a KPI from the outset connecting efficiency to the outcome (time, cost, conversion).

02.

Prioritize cross-functional use cases (not "local benefit").

Choose three to five use cases that span Marketing, Sales, Service, and Operations, where real value is captured.

03.

Design the use case as a process, not as a tool.

Map the end-to-end workflow: what data enters, what decision it makes, what action it executes, and who validates exceptions.

04.

Install cross-functional governance from the start.

Define minimum roles (sponsor, product owner, data/security, operation) to prevent agents from remaining confined to isolated experimentation.

05.

Ensure enabling capabilities: Talent & adoption.

Training and manuals for prompt engineering, workflow design, QA, and human supervision.

06.

Standardize the path from proof of concept to "pilot" then to "scale".

Define exit criteria per phase (quality, security, integration, cost) to order the portfolio.

The conclusion is that AI is already present, but the maturity leap is achieved when agents are designed as part of organizational capability—including governance, talent, and measurement—and subsequently anchored in cross-functional use cases that drive business metrics, rather than just local productivity.

3.7 Digital Commerce

Digital commerce can no longer be seen solely as "a sales channel": it is the point where digital strategy translates into transaction, margin, and experience. In practice, its level of maturity is defined by five fronts that have a direct operational impact:

1. Activated channel mix: across owned platforms, marketplaces, apps, social media, and conversational channels.

2. Use of data to personalize and convert: how information is leveraged to improve customer experience and increase conversion rates.

3. Tech stack: the infrastructure that enables operating and scaling efficiently.

4. Operational robustness: fulfillment processes, last mile, deliveries, and payments that support the experience.

5. Integration with marketing: governance and synergies that ensure commercial strategy.

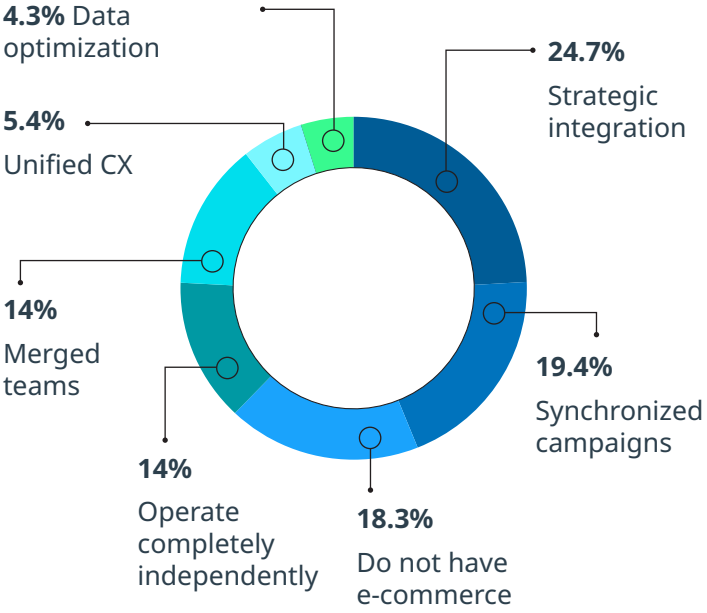
In this 2025 wave, the regional pulse on marketing–e-commerce synergies provides a broad view; in contrast, the operational details of commerce—which include channels, objectives, tool usage, KPIs, and logistics—appear in a small subsample, so its results should be interpreted as directional signals rather than a definitive snapshot of the Latin American market.



3.7.1 E-Commerce Channels and Reach

The strategic integration of diverse platforms and data optimization remain central in the Study of the Evolution of Digital Marketing in Latin America 2026, while implementation of synchronized campaigns increases.

Synergy in strategic decisions: e-commerce and marketing

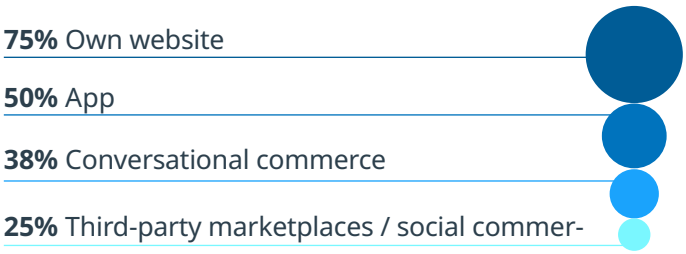


The findings in this section indicate that companies maintain tactical coordination, but have not yet consolidated the transition to data-driven collaboration as a dominant practice. And that is typically where margin efficiency and LTV are decided.

The **Retail** industry displays a more established footprint (only **6%** report having no e-commerce), whereas in **Banking/Fintech**, the proportion of organizations reporting they still do not have e-commerce rises to **24%**, which is consistent with models focused more on lead acquisition or non-transactional direct digital journeys.

By country, extremes with moderate sample bases stand out: **Uruguay** concentrates the highest "reported absence" (**50%**), contrasting with **Mexico** (**11%**), suggesting different baseline adoption levels.

E-Commerce channels



This aligns with portfolio logic (proprietary for margin/data; third parties for reach), which was already framed in 2024 as a dual growth strategy in digital commerce.

3.7.2 Strategic objectives of e-commerce

Digital commerce goals concentrate on three fronts with very similar prevalence, each representing around two-thirds of responses: acquisition, conversion, and lead generation.

By contrast, **retention/loyalty** and **database building & insights** appear significantly less.

Key goals of digital commerce



The tension is structural: companies prioritize short-term performance while investing less in what sustainably reduces Customer Acquisition Cost (CAC) through first-party data, repeat purchases, and sustained personalization.

In 2024, the primary use of digital commerce was also strongly anchored to conversion (65%), while data/insights appeared as a minority use case, reinforcing that the next step is not merely having data, but operating it as a competitive advantage.

3.7.3 Data and personalization in commerce

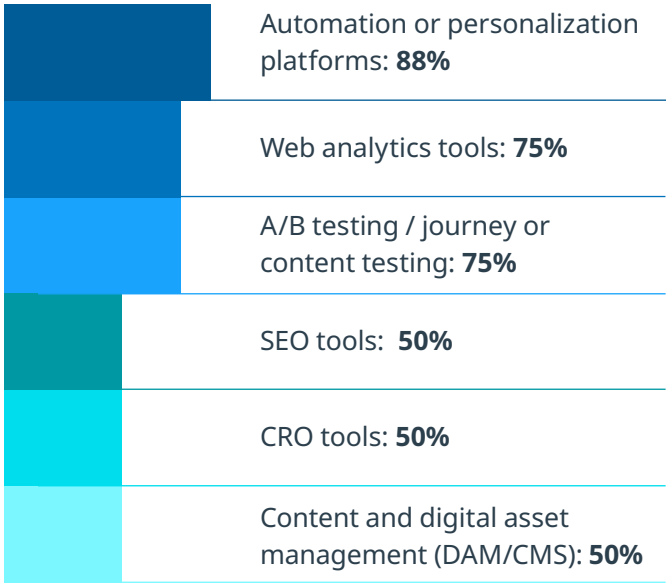
"Minimum viable" personalization is already quite widespread in the subsample: **88% implement behavioral segmentation** based on browsing history, completed purchases, or cart movements, but **only 50% of surveyed companies report dynamic personalization**.

In other words, the data exists, but it does not yet consistently translate into automated decisions for individualized offers, messaging, or experiences for consumers.

3.7.4 Tools to operate and scale

The technology inventory reported by respondents regarding commerce combines operations and optimization through the simultaneous use of various tools:

Tech stack inventory



Structural e-commerce tools show similar adoption levels, suggesting that the bottleneck extends beyond the front end (storefront) to catalog management, product data governance, and operational consistency.

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Beyond the adoption of these tools, a trend originating from the retail industry is consolidating: the creation of Retail Media Networks as a new structural lever for revenue and commercial efficiency.

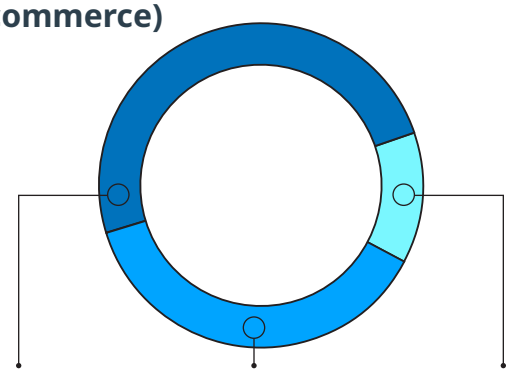
The most advanced organizations are monetizing their 1st-party data through brand collaboration models, incrementality measurement, and joint performance optimization, turning media into a new P&L line rather than just an activation channel.

3.7.5 KPIs and measurement maturity

Measurement in the digital commerce channel demonstrates intermediate maturity: **50%** integrate this division's KPIs with business objectives (revenue, margin, units), but **38%** remain at basic reporting (traffic/sales), and only **13%** report advanced models (forecasting/attribution/ dynamic optimization).

The operational risk is typical: growth is demanded, but without sufficient instrumentation to explain *why* digital commerce grows or contracts (mix, cohorts, repeat purchases, margin, logistics, promo-dependency).

Levels of measurement maturity (e-commerce)



50%
Integration with business objectives (revenue, margin, units).

38%
Basic reporting (traffic and sales only).

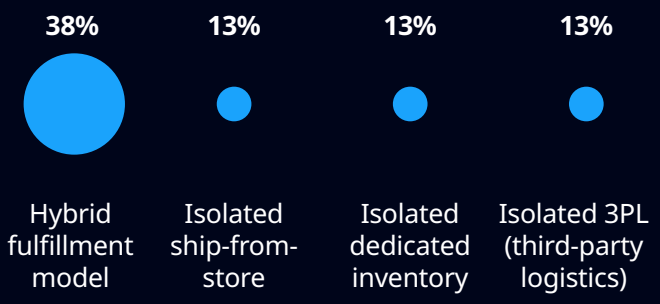
13%
Advanced models (prediction, attribution, dynamic optimization).

3.7.6 Operation: fulfillment, last mile, deliveries & payments

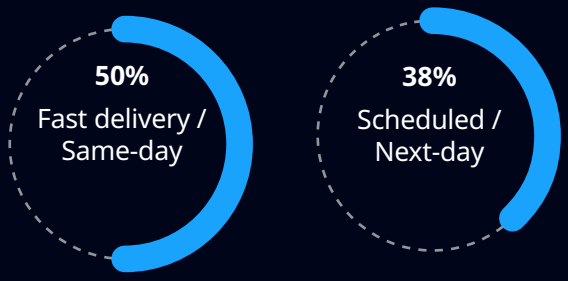
Digital sales operations vary considerably, with a predominance of mixed models, where companies report a hybrid fulfillment model and coexisting alternatives such as ship-from-store, dedicated inventory, and 3PL (Third-Party Logistics).

In last-mile delivery, half select "does not apply," which may indicate full outsourcing or the absence of an in-house last-mile operation; however, when they do disclose it, fast delivery and 3PL appear at 25% each. Regarding delivery types, "fast" capabilities stand out: 50% offer fast delivery and same-day delivery, and 38% offer scheduled and next-day deliveries.

Commerce operation



Type of delivery offered:

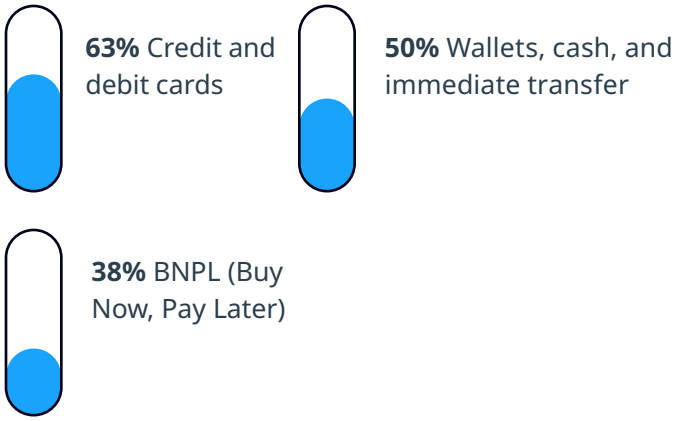


Note: 50% of companies fully outsource their last-mile operation.

Regarding digital commerce payments, the mix reflects local preferences and a focus on conversion, given that 63% enable credit and debit cards as their main method; additionally, 50% combine options such as wallets, cash, and transfers (SPEI/instant payment).

The presence of BNPL (Buy Now, Pay Later) is noteworthy, appearing in 38% of responses, signaling a drive for conversion in contexts sensitive to price and financing.

Payment methods:



Practical implications

Priority #1: Governance and shared KPIs. When marketing and commerce do not share objectives, optimization ends up being local and expensive.

Priority #2: Actionable personalization. The next step after behavior-based segmentation is executing it, activating it in real-time journeys and offers.

Priority #3: Operation as a competitive advantage. Fast deliveries and local payments act as direct levers for conversion.

04

Final Reflections and Recommendations

4. The Industry Moment

4.1 From adoption to strategic integration

The **Digital Marketing in Latin America 2026** study confirms that the digital industry in this region has entered a distinct stage of maturity. The main discussion is no longer about adopting channels, adding tools, or expanding digital presence, but about the actual capacity of organizations to integrate those capabilities and turn them into a sustainable competitive advantage.

The region has already built a solid foundation for digitalization; the challenge now is to make that base function as a system.

The cross-cutting signal provided by companies is clear: they are advancing in strategy, data, automation, measurement, artificial intelligence, and commerce, but they are not doing so at the same pace, nor with the same level of integration.



That asymmetry is what explains much of the current friction, as there is greater tactical capabilities than coordination capabilities; more tools than governance; more execution than traceability; and more initiatives than an operating model.

This completely redefines the agenda for executive leadership. The risk is no longer merely falling behind in adoption, but growing in complexity faster than the organization can absorb, govern, and monetize. From this point forward, continuing to incorporate technology, channels, or pilots without addressing integration prerequisites generates more costs, more silos, and more duplication than value.

The closing strategic takeaway, then, is straightforward: the competitive advantage has shifted from "having" to "connecting." Connecting strategy with execution, data with activation, measurement with business decisions, AI with cross-functional processes, and commerce with profitability. It is across these dimensions that the distance between organizations that scale and those that stagnate is currently defined.

4.2 Key considerations

Integration is the new competitive frontier

The most consistent finding of the study is that the region no longer faces a problem of basic adoption. A relevant majority operates with full-funnel logic, an installed base of CRM and automation exists, and the use of consolidated digital channels is already part of regular operations.

However, that expansion does not automatically equal maturity. The difference becomes evident when those pieces stop operating as isolated layers and begin functioning as an integrated system. Real maturity is not defined by the presence of tools, but by the ability to articulate data, processes, decisions, and objectives under a unified execution logic.

This has a central implication for C-level executives: strategy can no longer be evaluated by the number of capabilities added, but rather by their degree of interoperability.

When the organization adds new layers of technology without resolving traceability, ownership, data governance, and cross-departmental coordination, operational complexity increases faster than the ability to generate return on investment. In that scenario, the problem ceases to be technological and becomes one of organizational design.

Strategy has matured faster than execution

The advancement of companies toward more comprehensive approaches is a positive sign. The marketing conversation is closer to the business than in previous stages, and full-funnel logic is no longer marginal.

However, the study also shows that this strategic evolution still coexists with uneven execution, because priorities are more ambitious, yet processes remain partial; objectives are more integrated, but investment is unbalanced; there is greater emphasis on coordination, but operational capabilities remain fragmented.

The above forces a redefinition of what maturity means. It is no longer enough to declare a more complete strategic vision; true maturity lies in sustaining it through actionable priorities, a concise set of shared KPIs, clear roles, and a common decision-making cadence among marketing, data, technology, finance, and, where applicable, commerce. In other words, strategy only truly matures when it becomes governable.

The advantage of data activation

The region shows clear progress in customer knowledge, segmentation, and the consolidation of first-party data. Although the critical gap remains the same: having data does not guarantee converting it into decisions, and segmenting does not equal personalizing. The distance between these two aspects is, today, one of the main sources of value loss.

The inflection point is no longer about collecting more information, but rather about better operating what already exists. This requires a unified identity, decisioning capabilities, traceability between signals and actions, as well as an infrastructure that allows continuous activation.

Under that logic, data stops being an advantage based on volume and becomes an advantage based on governance, interoperability, and activation capacity.



Furthermore, the competitive standard is already toughening. The study reveals an evolution toward more robust frameworks, such as active consent management, privacy-first approaches, server-side tagging, secure collaboration environments, and more flexible architectures to connect storage, activation, and decisioning.

It is not just about technological sophistication, but about ensuring that data can circulate with quality, control, and real utility across the entire system.

Measurement remains the main constraint on capturing and defending value

If there is one dimension that organizes the executive agenda, it is metrics. The region advanced because isolated measurement decreased, analytical capabilities grew, and continuous optimization improved.

Despite this, the decisive leap remains pending: translating reporting into a compelling narrative of business contribution. A relevant portion of the market still measures using tactical, channel-by-channel logic, while metrics directly connected to business indicators—such as profit margin, EBITDA, market share, or incremental value—remain clearly in the minority.

The consequences are significant. Without a shared measurement baseline, each department optimizes locally: marketing for tactical efficiency; performance by channel; sales for conversion; commerce for volume; and finance for cost.

The result is an organization that produces vast amounts of data but makes decisions with a fragmented vision. In this context, discussions around ROI weaken, and digital investment is left exposed to budget cuts, objections, or decisions driven more by intuition than evidence.

The study conducted across Latin American countries also delivers a critical warning: measurement maturity does not depend solely on the chosen analytical model, because what matters is the quality and ownership of the raw material.

Without access to primary campaign data—especially when operations are outsourced—even the most sophisticated models lose real capability to guide budget allocation and defend return. Without control over that input, attribution is inherently limited from the start.

AI is already in use, but not yet a structural capability

Artificial Intelligence has ceased to be a hypothetical conversation among companies in the region. The question is no longer whether it is used, but for what purpose, with what level of governance, and with what impact.

This is where one of the study's most relevant tensions emerges: adoption moved faster than the organizational structuring required to sustain it. Usage is growing, but its impact remains concentrated in quick-return tasks with lower data dependency, while use cases with more transformative potential for the business still lag behind.

That contrast is decisive... AI is already visible in content, design, and conversation; however, it has not yet been adopted at scale in real-time personalization, automated nurturing, forecasting, predictive models, or cross-functional processes with direct impact on profitability, efficiency, or growth.

Curiosity is no longer the barrier; the challenge now lies in organizational capability: data quality, governance, tool maturity, specialized talent, and clarity of the use case.

Therefore, the real differentiator is not found in "having AI," nor even in using agents, but in deciding with precision which part of the operating model to redesign with it.

The most advanced organizations are already shifting AI from isolated productivity toward operational standardization. The clearest example is the evolution toward end-to-end content supply chain frameworks, where AI not only accelerates production but connects briefing, adaptation, compliance, tagging, and activation.

This is why the discussion therefore shifts from tactical to structural, encompassing consistency, scalability, and a tangible reduction in time-to-market.

The remaining gap is consistent activation

This point runs through several chapters of the study and works as a synthesis of a broader tension. The region has already built an important base of segmentation using its own data, but advanced personalization and dynamic real-time execution remain the exception.

What is missing is not information; the gap lies in the ability to translate it into experiences, messages, offers, and decisions sustained at scale.

The same is true of omnichannel, because in this case the conversation has evolved and the standard has become more demanding; it is no longer enough to coordinate presence across channels or share objectives in general terms.

Real omnichannel requires operational integration, centralized reporting, data governance, and an orchestration logic that allows decisions to be made with a system-wide view. Against that higher threshold, adoption remains limited.

The implication for companies is clear, because expanding the channel mix, adding emerging inventory, or diversifying tactics does not generate value on its own. Without a common base of data, measurement, and decision-making, expanding the ecosystem does not reduce friction — it multiplies it.



Digital commerce is now about margin and the business model

Digital commerce has stopped being a tactical extension of marketing. In the most mature organizations, it already functions as the point where strategy turns into transaction, margin, experience, and real profitability.

That is why variables that were not previously central to the conversation are gaining relevance: logistics, payment methods, recurrence, cohorts, operating cost, delivery speed, and conversion efficiency.

Here too, the main gap is one of integration. The problem is no longer "having e-commerce," but truly connecting it with marketing, data, and measurement.

When marketing and commerce do not share KPIs or decision routines, optimization ends up being local and expensive. Traffic is acquired without a complete view of profitability, conversion gets pursued without a view of recurrence, and volume gets measured without factoring in logistics cost or customer quality.

At the same time, the study points to a relevant evolving signal: for certain organizations, especially in Retail and related environments, commerce is beginning to evolve beyond being just a sales outlet and is becoming a broader value platform.

The emergence of Retail Media Network models shows exactly that — the possibility of monetizing first-party data, owned traffic, and measurement capability as a new revenue stream and collaboration. At that point, commerce stops being just a channel and starts operating as a business asset.

Regional heterogeneity shapes strategy

Another relevant finding of the research is that the gaps between markets are not incidental. The region does not operate at a homogeneous level of maturity, and that has direct consequences for investment, priorities, and speed of adoption.

Some markets already show the conditions to scale advanced capabilities, while others still need to consolidate minimum viable levels in instrumentation, attribution, and automation.

For regional operations, this requires abandoning the logic of a single roadmap for everyone. The right strategy is not to replicate the same standard with different intensity, but to calibrate priorities by market — building foundations where they are missing, integrating where critical mass already exists, and adding sophistication where enabling conditions are already resolved.

Regional maturity, in that sense, should not be read as an average, but as a differentiated map of decisions.



4.3 Priority recommendations for the C-Level

1. Resolve a minimum viable integration before scaling complexity. Define a clear data and operation architecture specifying what sources enter, who governs them, and how they unify. Ensure the current base—CRM, activation, reporting—operates in an integrated and traceable manner before investing in sophistication.

2. Standardize measurement as a management asset. Measure better and with a shared language. Executive leadership needs a reduced, stable set of executive KPIs connected to business results. Attribution must be professionalized by stages: first data and reporting integration, then incorporating complementary models for budget allocation and incrementality validation.

3. Convert existing data and segmentation capabilities into actionable personalization. Instead of promising generalized hyper-personalization, concentrate efforts on a few high-impact journeys—retention, nurturing, cross-sell, and recovery—where data is sufficiently clean, identity is consistent, and there is the ability to sustain ongoing content operations. Today, differentiation is not achieved by simply claiming to offer personalization, but by executing it with quality and consistency.

4. Manage AI as a value portfolio and not as a sum of isolated tests. Each initiative should have, from the outset, an executive owner, an explicit business KPI, clear supervision rules, and a specific process redesign definition.

Efficiency quick wins remain useful, but they should not exhaust the agenda: the real leap is moving AI toward cross-functional processes like industrialized content chains (content supply chain), better audience orchestration, commercial optimization, and automation with traceability. For that, talent, governance, and training are no longer complementary; they become baseline requirements.

5. Operate multichannel and commerce under a single governance logic. Demand shared KPIs, joint review routines, and a conversation connecting awareness, conversion, margin, recurrence, and operational cost. Cross-functional coordination must evolve into a shared decision-making model, evaluating if the owned ecosystem can evolve into new forms of monetization like retail media.



6. Ensure ownership and traceability of primary data. Where operations depend on third parties, the organization must demand sufficient access to logs, costs, audiences, and results. Without this foundation, measurement weakens, attribution loses precision, and AI is trained on, or makes decisions based on, incomplete information. At this stage of maturity, regaining control over data is no longer a technical recommendation; it is a strategic imperative.

Finally, in a heterogeneous region with a transforming discovery ecosystem, leadership must avoid two pitfalls: assuming that all markets are ready for the same level of sophistication, and continuing to manage organic visibility with an exclusively pre-generative logic.

Market-by-market calibration and progressive adaptation to AI-assisted discovery environments are already part of the near-term strategic agenda, not a future consideration.

4.4 Executive closing: the agenda that cannot wait

This study shows an industry undergoing a significant maturity transition. And precisely because of that, the moment is decisive. When the foundations already exist, the advantage comes from the discipline with which those foundations are turned into integrated operations, actionable measurement, and sustainable decisions.

The sequence the study reveals is telling: the region adopts faster than it integrates, integrates faster than it measures, and measures faster than it translates into business decisions.

That misalignment is today the main limit to capturing value. Closing those gaps in the right order is the strategic priority of the next cycle.

For CMOs, the above implies three immediate mandates: professionalize measurement to defend investment in business language; move from declared segmentation to real activation; and manage AI as an organizational capability connected to processes and results, not as a collection of proof-of-concept tests.

For CEOs, the conclusion is even broader: the digital transformation of marketing is no longer just a matter for that department, but a business agenda that involves organizational design, data, technology, finance, operations, and talent.

The window remains open, but not indefinitely. The region's foundations are stronger than they were a year ago, although foundations alone do not produce advantage.

Competitive advantage will depend on the ability to turn these foundations into integration, translate them into a credible measurement discipline, and scale them with an operating model capable of sustaining growth, efficiency, and profitability. That is what defines competitiveness today.

05

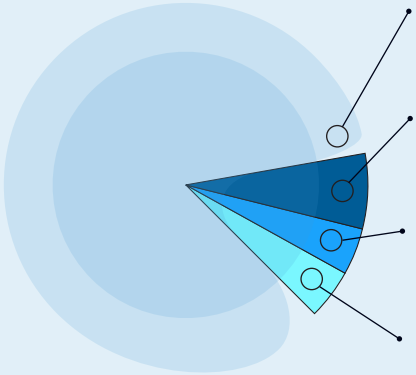
Methodology



Company Profile

The size, business model, and industry sector of the participating organizations in this study provide a clear picture of their digital interaction.

Size by employees number



Large
84.9%
More than 250 employees

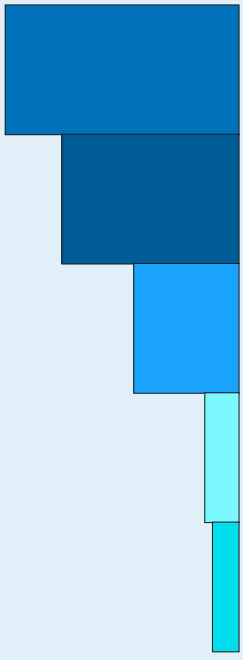
Small
6.5%
11 to 50 employees

Medium
4.3%
51 to 250 employees

Micro
4.3%
0 to 10 employees

Note: Companies could select more than one option.

Business model



66.7%
B2C (Business-to-Consumer)

50.5%
B2B (Business-to-Business)

30.1%
B2B2C (Business-to-Business-to-Consumer)

9.7%
D2C (Direct-to-Consumer)

7.5%
B2G (Business-to-Government)

Methodology

Unlike the previous 2024 study on digital marketing, this evolution required adding more countries to better reflect the current landscape across Latin America.

Thus, companies from Colombia, Panama, Ecuador, Uruguay, and Guatemala were incorporated.

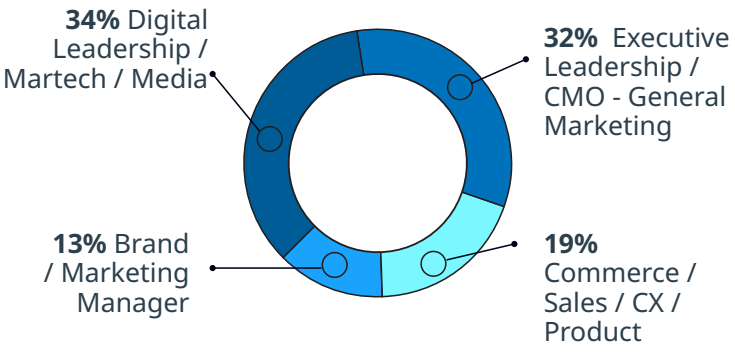
The mixed methodological design (quantitative + qualitative) was conducted with brands/advertisers and enterprise companies (excluding agencies) to combine a statistical view of the market with executive context, enabling the interpretation of decisions, gaps, and the overall level of digital maturity and AI integration.



In the quantitative component, the integrated sample totaled **775 survey responses/diagnostics**, taken as the main baseline for the study. This was completed with the integration of two documents from Tecnológico de Monterrey: *"Estudio sobre la Madurez Digital de las Empresas Platino y Titanio de la iniciativa MEM" and "Leveraging CRM Capabilities for Enhanced Relationship Maintenance and Performance: Empirical Insights from Latin America's Business-to-Business Sector"*, both published in 2025.

In the qualitative component, **20 interviews with C-Level executives** at Latin American companies were conducted to deepen interpretations, understand decisions behind digital/AI maturity, and add operational context to the quantitative results.

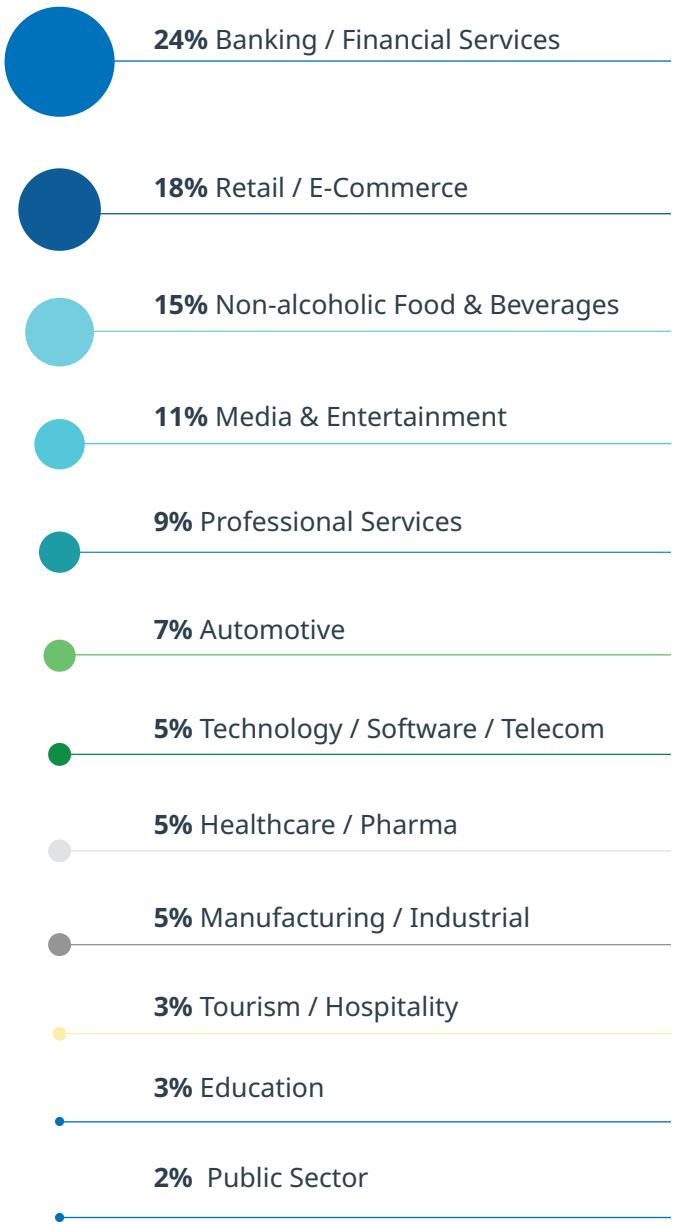
Participant Profile



Regarding the timeline of digital strategy adoption, evidence shows a distribution across three nearly equal tiers: 34% of organizations report implementing them for more than 10 years; 32% are recent adopters (1 to 3 years); and 31% are in an intermediate phase (4 to 9 years).

On the margins, **2%** plan to adopt them in the coming year, and **2%** do not consider them relevant at this moment, confirming the coexistence of organizations with consolidated capabilities alongside others that are still establishing foundational capabilities.

Industries Represented in the Survey



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