

An aerial photograph of a calm lake surrounded by a dense forest. Several kayakers in red and yellow kayaks are on the water. A yellow dotted line starts from the right side of the frame and extends towards the center, where it meets the text. Two vertical yellow bars are positioned on either side of the main title.

Chief Marketing Officer Leadership Vision 2023

3 Strategic Actions for Success

Chief marketing officers (CMOs) know that driving efficient growth is a top priority. But in today's volatile environment customers are unpredictable. Cross-functional collaboration can be a struggle and traditional sources of brand value are eroding. Add to the mix pandemic waves, supply chain disruption, inflation and geopolitical instability, and the challenges are huge.

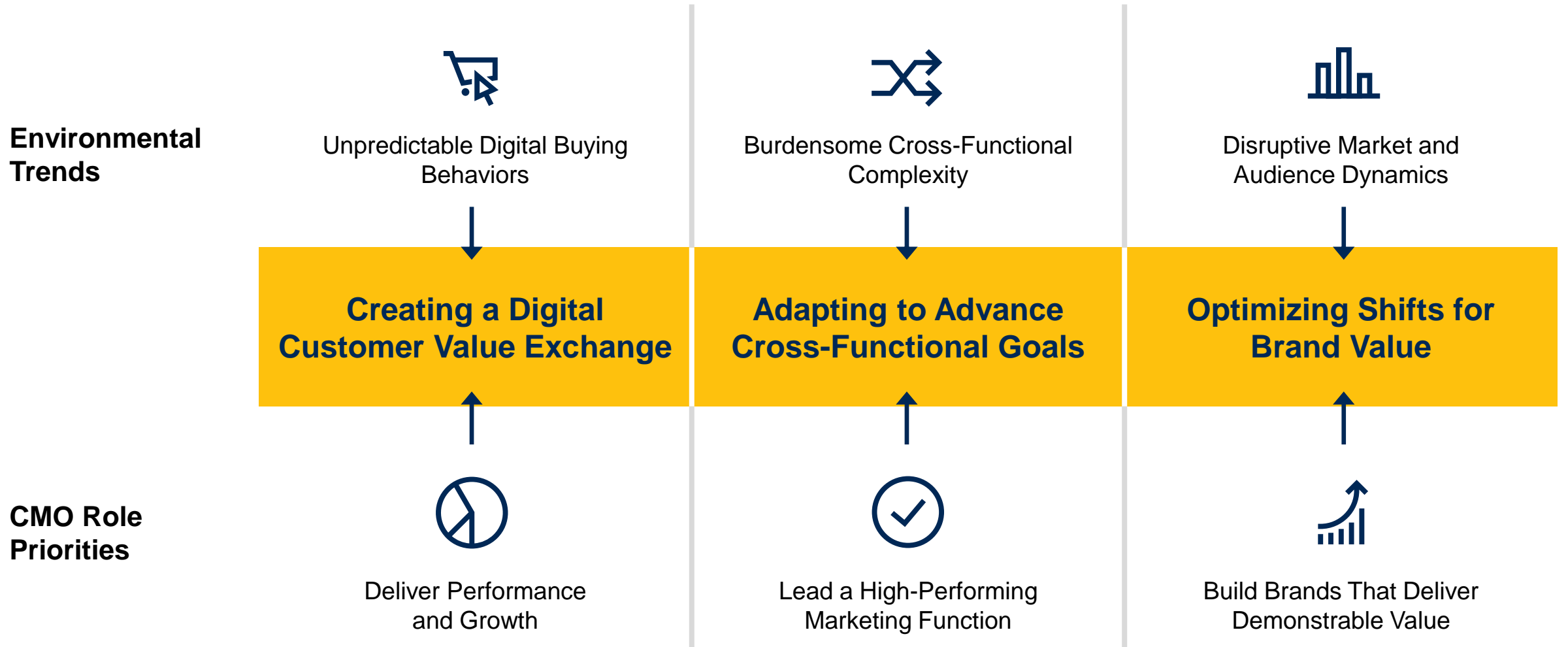
To meet these challenges, CMOs need to adapt their strategies for efficient growth in a high-velocity world. The current environment demands a relentless focus on using digital to create customer value, advancing cross-functional goals and optimizing shifts for brand value.

Use this research to help answer three questions that are key to leading marketing success in 2023 and beyond.

Key questions addressed:

- ① What are the major trends affecting CMOs?
- ① What are CMOs' top priorities?
- ① What actions should CMOs take now to be successful?

3 Key Themes Demanding CMO Action in 2023





Key Issues



What are the major trends affecting CMOs?



What are CMOs' top priorities?



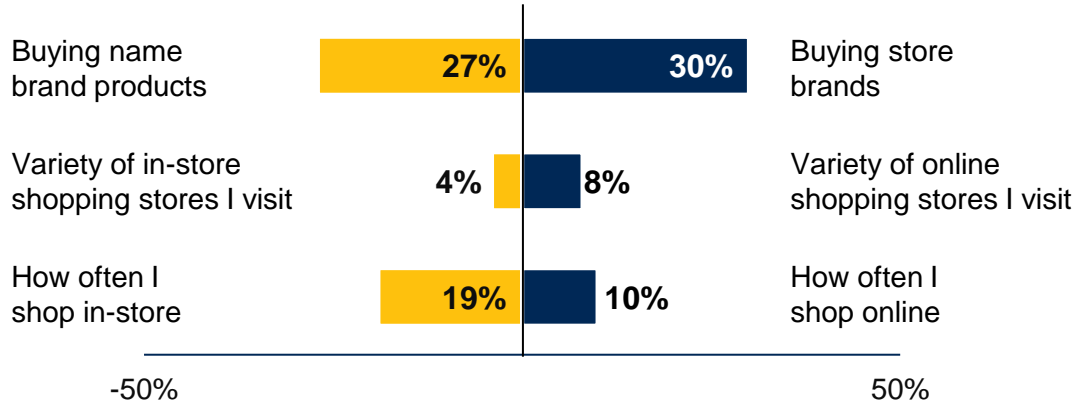
What actions should CMOs take now to be successful?

Customers' Digital Buying Behaviors Are Evolving, Disrupting Value Exchange

Inflation Shifts Shopping Behaviors

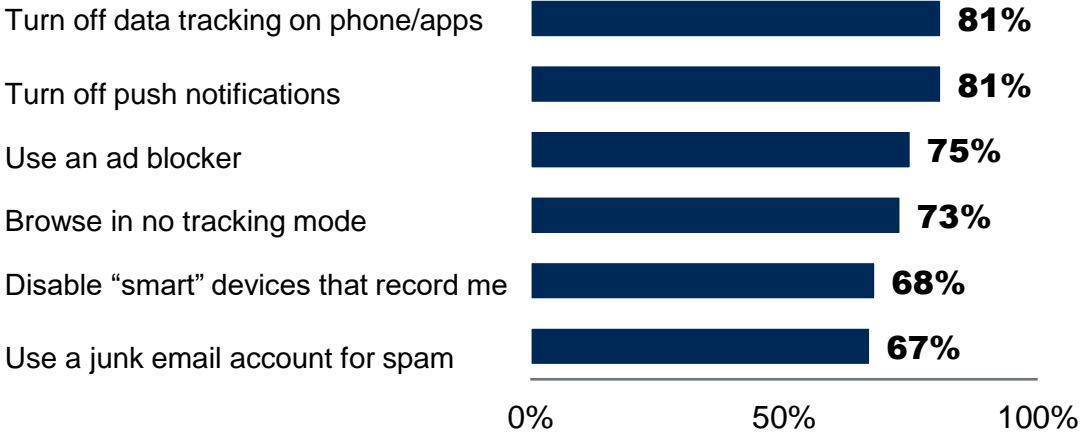
Net Change in Routine Shopping Activities Due to Inflation

■ Net Decrease ■ Net Increase



Customers Take Steps to Protect Their Data

Percent of Customers Who Take the Following Digital Privacy Actions



Inflation Shifts Shopping Behaviors

Customers Take Steps to Protect Their Data

n = 1,501 U.S. consumers
 Q: How is inflation impacting how you shop for things that you need to buy regularly (such as food or groceries, household products, or personal care items)?
 Source: 2022 Gartner Consumer Cultural Attitudes and Behaviors Survey
 Note: Net change = percent increased – percent decreased

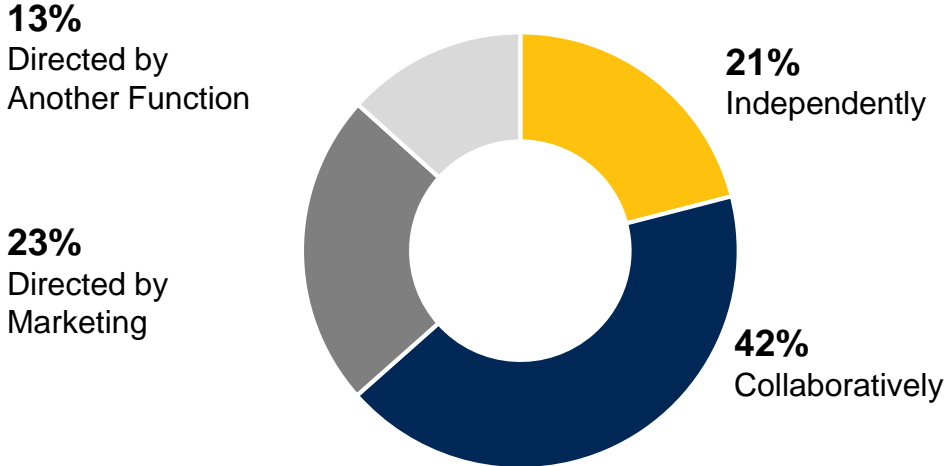
n = 1,499 consumers and B2B buyers
 Q: Please rate your agreement with the following statements.
 Source: 2021 Gartner Personalization Survey



Cross-Functional Collaboration Yields Worse Revenue Outcomes

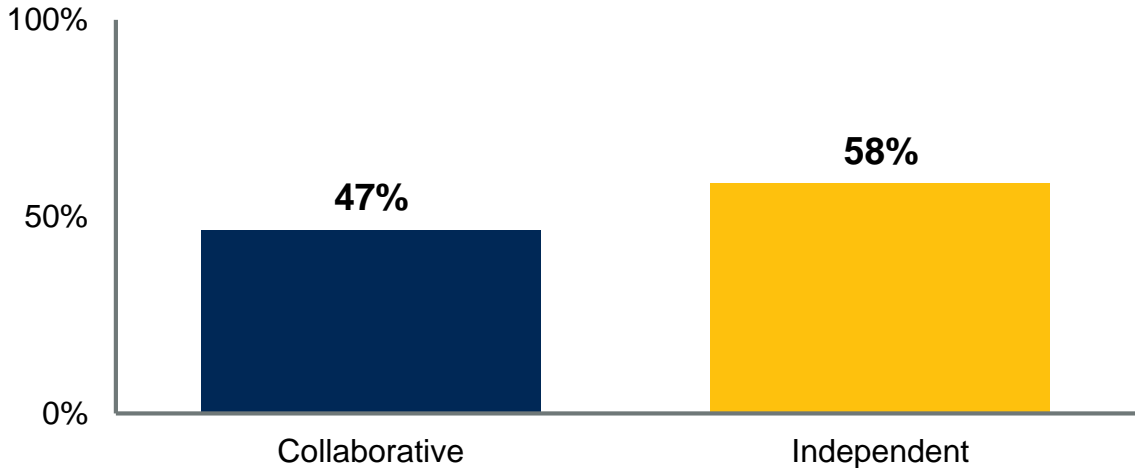
Few Marketers Prefer Independent Planning

How Marketers Believe They Should Approach Building a Roadmap for Digital Revenue Growth



Independent Planning Drives More Revenue Growth

Marketers Who Exceeded Their Customer Acquisition Goal Last Year, by Approach to Digital Revenue Growth



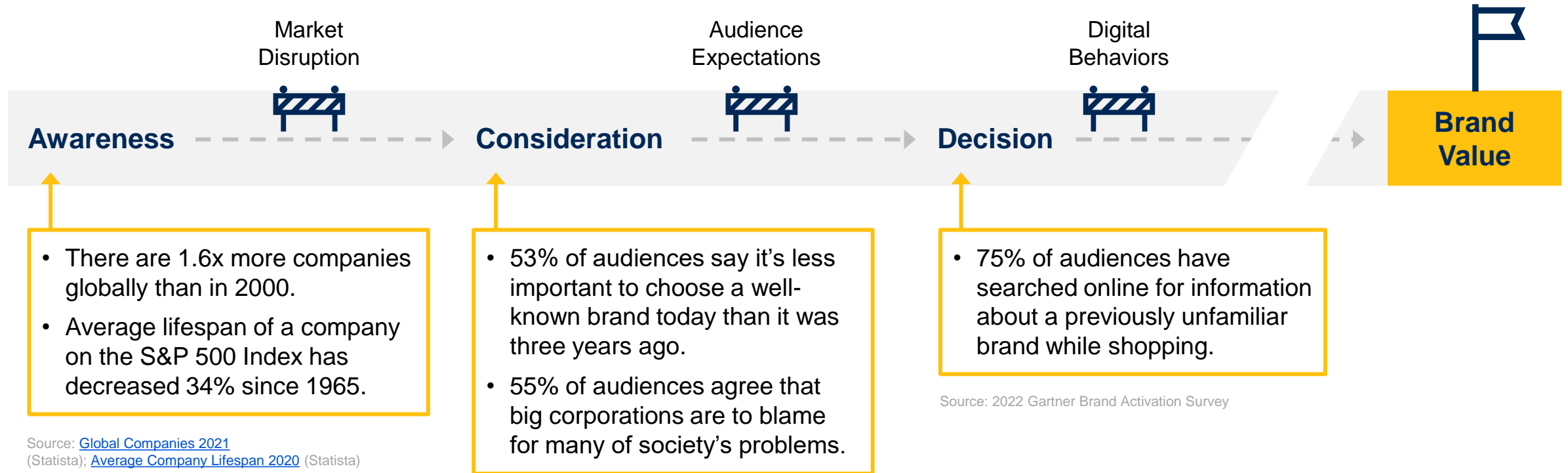
Few Marketers Prefer Independent Planning

Independent Planning Drives More Revenue Growth

n = 392; marketers who complete "developing a strategic roadmap for digital revenue growth"
 Q. Regardless of how they are being managed today, how do you believe each of the following activities should ideally be managed at your organization?
 Source: Gartner 2022 Gartner CMO Spend and Strategy Survey

n = 392; marketers who complete "Developing a strategic roadmap for digital revenue growth"
 Q. Below is a list of activities that may take place in your organization. For each activity, please indicate the way that it is currently executed.
 Source: Gartner 2022 Gartner CMO Spend and Strategy Survey

Disruptive Market and Audience Dynamics Block Traditional Pathways to Brand Value



Source: [Global Companies 2021](#) (Statista); [Average Company Lifespan 2020](#) (Statista)

Source: 2022 Gartner Brand Activation Survey

Source: 2022 Gartner Brand Activation Survey



Key Issues



What are the major trends affecting CMOs?



What are CMOs' top priorities?



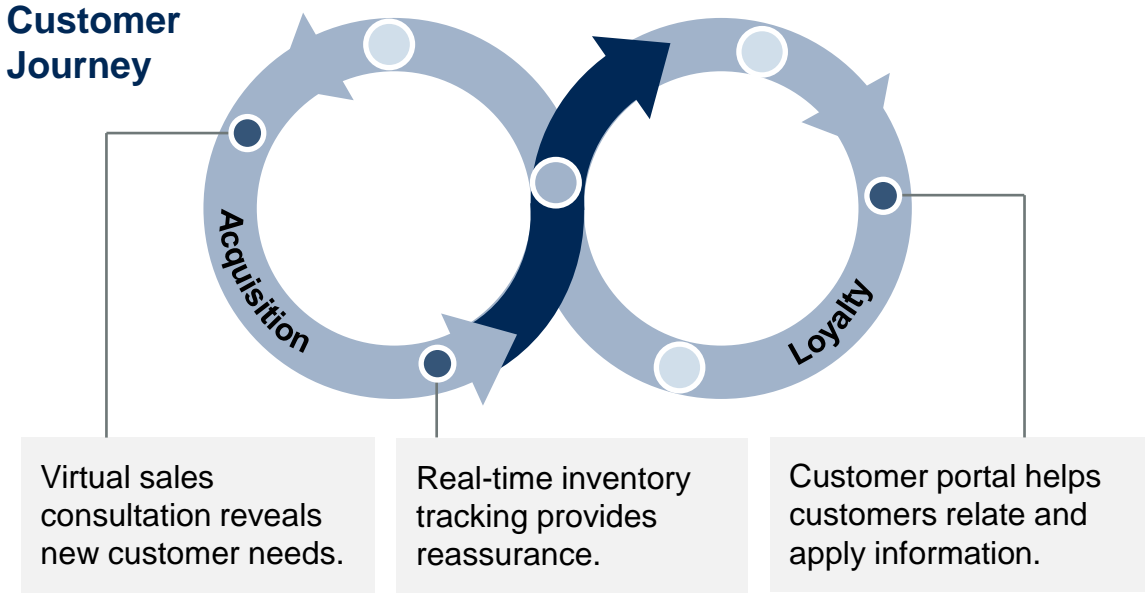
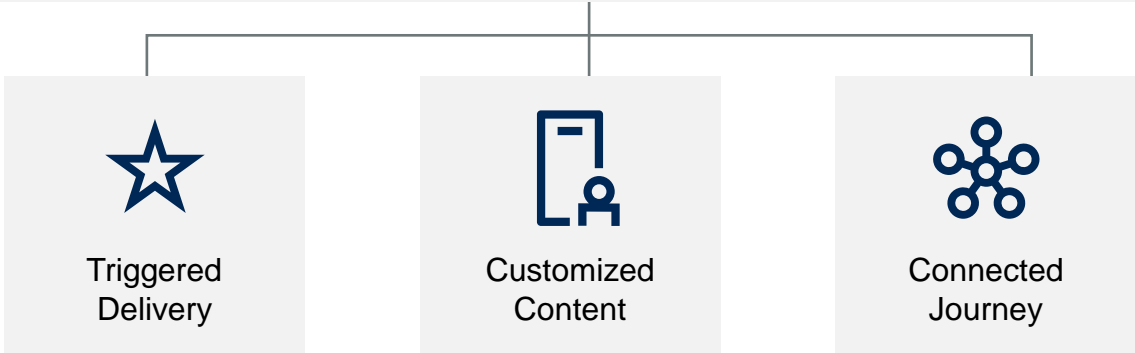
What actions should CMOs take now to be successful?

CMOs Must Provide Mutual Value on Digital Channels Across the Full Customer Journey

Personalization Capabilities

Customer Journey Orchestration

Personalization
The practice of **using customer data** to deliver a **tailored interaction** between the brand and the customer.



CMOs Aim for High-Value Personalization

Orchestration Should Create Customer Value

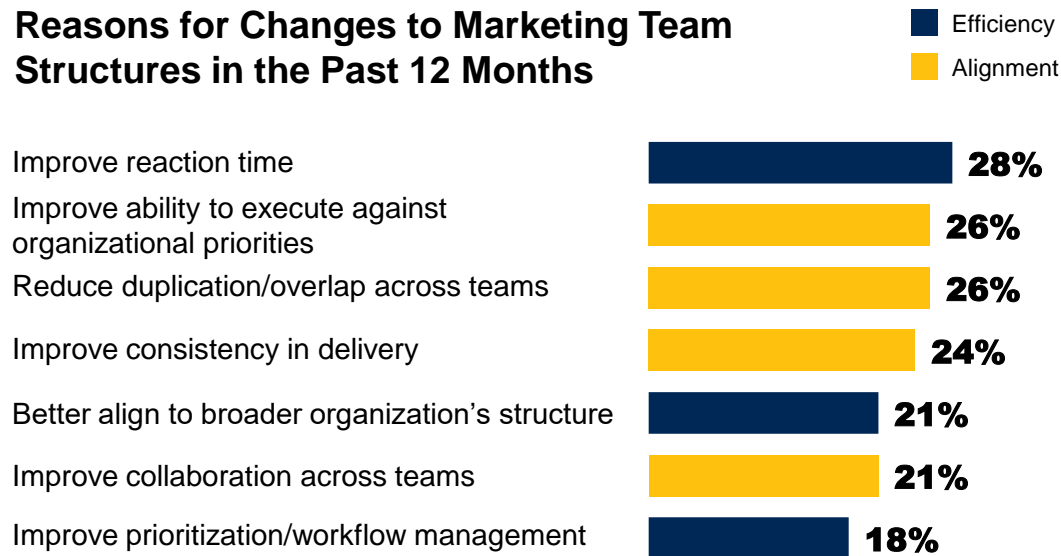
Source: Gartner

Source: Gartner

CMOs Must Adapt Their Teams to Advance New Cross-Functional Operating Models

CMOs Restructure Teams for Operational Effectiveness

Reasons for Changes to Marketing Team Structures in the Past 12 Months



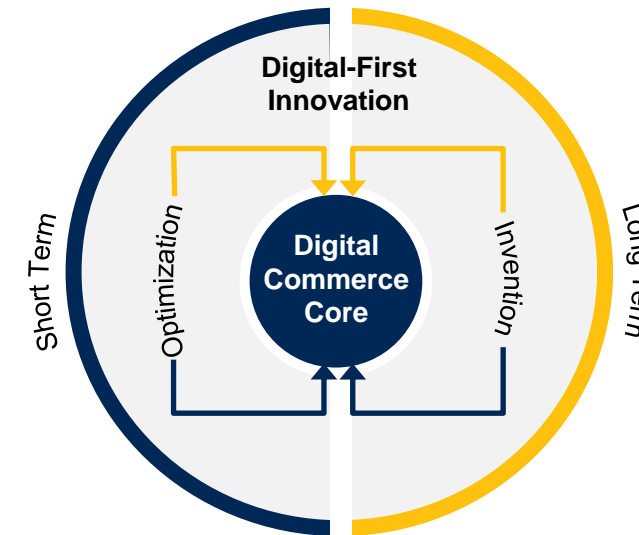
CMOs Restructure Teams for Operational Effectiveness

n = 147 marketing leaders citing reasons for change to function structure over last 12 months
 Q. What were the top drivers of the change in your Marketing function's structure? (Data results shortened for presentation purposes.)
 Source: 2022 Gartner Marketing and Communications Organization Survey

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CMOs Aspire to Build Teams That Drive Short- and Long-Term Digital Growth

Model for Digital Revenue Growth



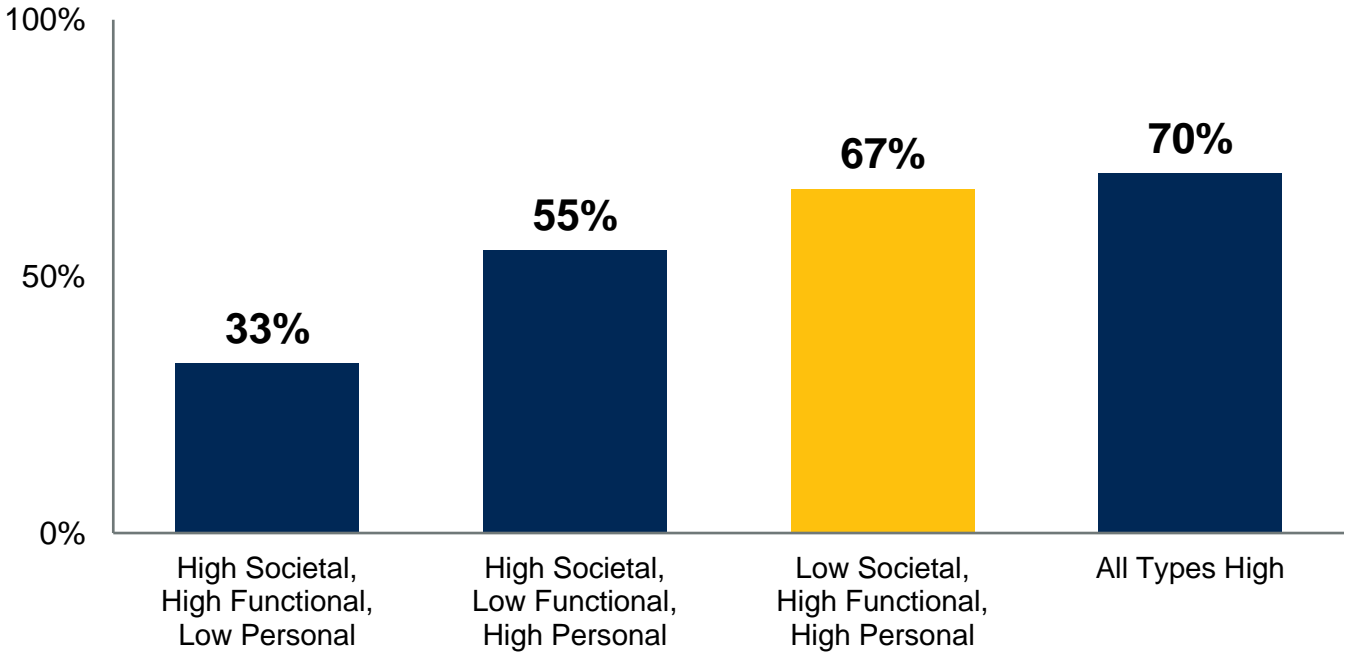
CMOs Aspire to Build Teams That Drive Short and Long-Term Digital Growth

Source: Gartner

CMOs Must Activate the Customer Benefits of Brand Investments

Societal Benefits Have Minimum Impact on Brand Commitment

Impact of Benefit Combinations

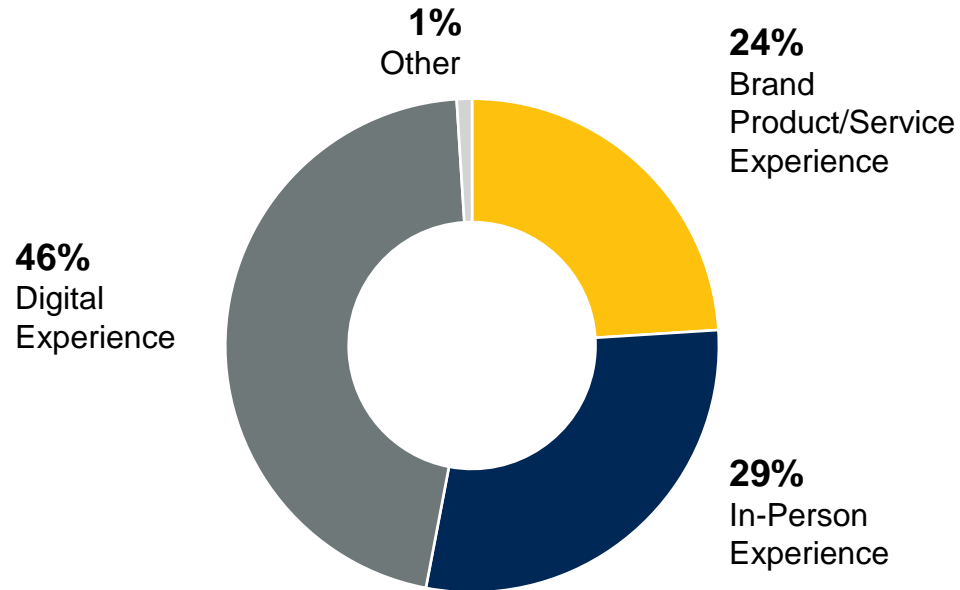


CMOs should make the most of their budget by delivering a combination of personal and functional brand benefits. The additional effect of societal benefits is very small (3%).

n = 1,896 consumers, B2B buyers and employees
Source: 2022 Gartner Brand Activation Survey
Note: Results are based on multiple regression model with controls.

CMOs Must Activate the Customer Benefits of Brand Investments

Channels Where Audiences Are Having Meaningful Brand Experiences



To drive commitment in a shifting environment, CMOs must realize brand value through experience. CMOs can win brand commitment through a single meaningful experience on a digital or nondigital channel.

n = 431 consumers, B2B buyers and employees
Source: 2022 Gartner Brand Activation Survey

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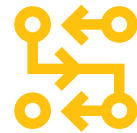
Key Issues



What are the major trends affecting CMOs?

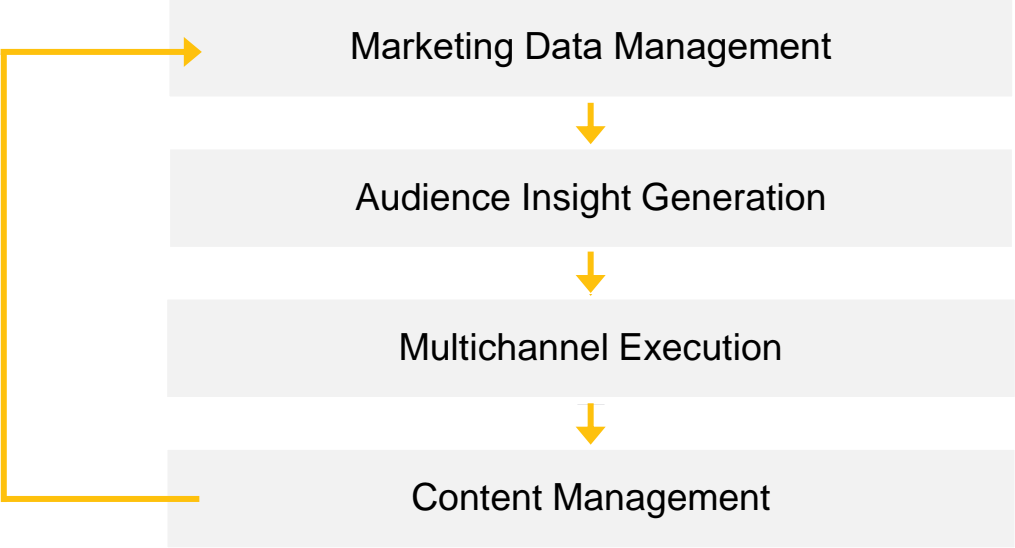


What are CMOs' top priorities?

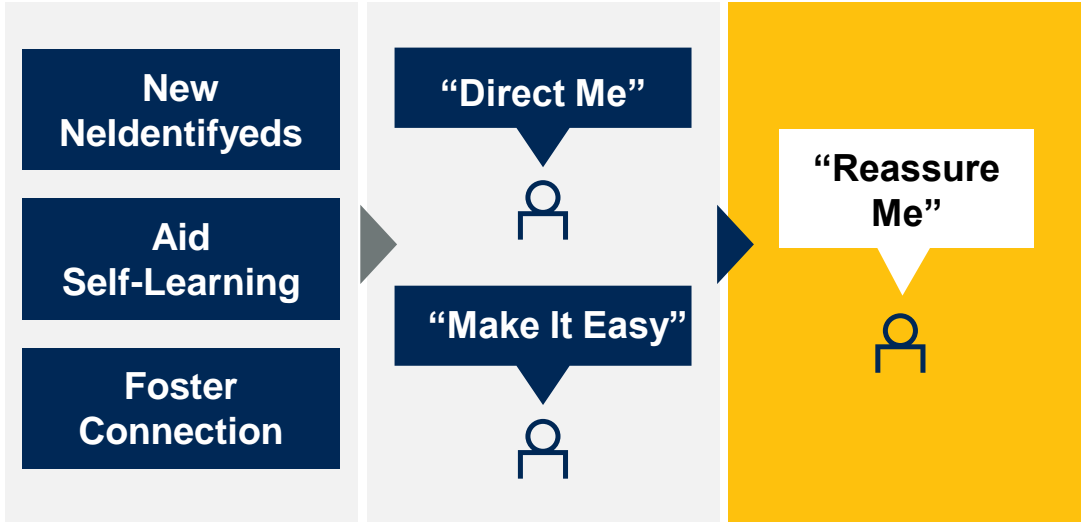


What actions should CMOs take now to be successful?

Focus Marketing Efforts on Genuinely Helping Customers in Their Journeys



Customer Path to Purchase



Orchestrate interactions that provide specific forms of help across the full journey (e.g., customer self-learning, direction, reassurance).

Source: Gartner

Diagnose Whether Marketing's Operating Model Supports Digital Revenue Growth

Questions to Identify Limitations in Marketing's Operating Model:

- Would an in-house agency model align to the broader organization's structure?
- Would a center of excellence improve collaboration across teams?
- Would a shared services model improve prioritization and workflow management?

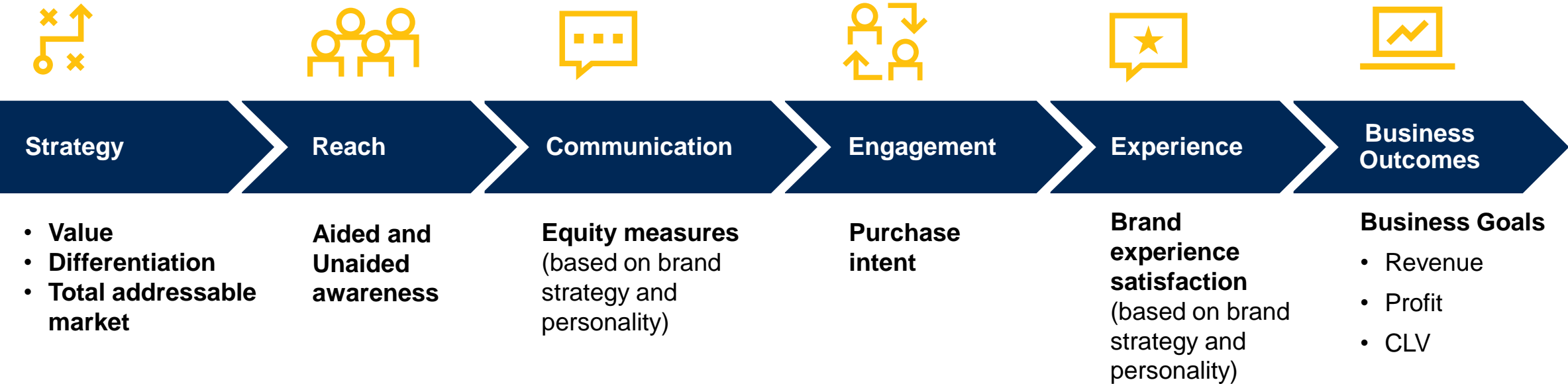
Effective collaboration is not achieved through org changes but through operating model evolution.

Gartner's Reference Guide to Internal Marketing Operating Models

	 In-House Agency	 Center of Excellence	 Shared Service	 Newsroom	 Project Pods
Use Case Examples	Creative Agency, Content Studio, Research Strategists, MD&A Strategists	Marketing Operations, Customer Experience	High-Volume Content Production	High-Volume Editorial Content, Media/PR Strategists	Fusion Teams, Tiger Teams, Large Iterative Projects or Ideation
Entity	Formal	Formal	Informal	Formal	Informal
Orientation	Strategic/Creative	Strategic	Production	Narrative/Execution	Design/Execution
Cost	\$ - \$\$\$\$	\$\$ - \$\$\$	\$ - \$\$\$	\$\$ - \$\$\$\$	\$\$ - \$\$\$\$
Talent	Entry- to Senior-Level	Mid-Level	Entry- to Mid-Level	Mid- to Senior-Level	Mid- to Senior-Level
Head	Creative Director, Creative Operations, Marketing Strategist	Marketing Strategist, Marketing Operations Director, Brand Marketing Director	Marketing Manager, Marketing Director	Editor-in-Chief, Communications Director, PR/Media Director	Scrum Master, Product/Project Director, Innovation Strategist
Core Duty	Strategy/Execution	Consistency	Fast Execution	Opportunistic Work	Fast Cycle Delivery
Typical Function	Effective, Quality Output	Set Brand or Process Standards	Efficiently Fulfill Requests	Quickly Publish Opinions	Prototyping, Proof-of-Concept
Typical Work	Concept Campaign or Complex Content	Brand Standard, Marketing Best Practices, Compliance	Simple, Repetitive, Templated Deliverables	Fast-Cycle Content: Interviews, Podcasts, Blogging and Social	Digital Product Development, Innovation or Optimization
Branded	Yes	No	No	Yes, Editorial Team	No
External Agency or Provider Support	Overflow or Production; Data or Research Vendors; Partner Agencies	Brand Standards, Templates, Photography, or Guidelines	Agencies for Strategy or Campaign, Plus Vendors	Agencies for PR, Media or Content Marketing Strategy or Production	Agency Specialists

Connect Brand Strategy to Experience and Business Outcomes

Brand Health Measurement Framework



Connect brand health to experience and business outcomes to quickly demonstrate value from brand investments.

Recommended Actions

- ✓ Provide mutual value on digital channels across the full customer journey by optimizing orchestration capabilities and using customer-directed engagement models to guide your personalization strategy.
- ✓ Adapt marketing team structures and skills to support new cross-functional operating models by evaluating where marketing should have sole or shared responsibility and applying the best operating model for each of your core capabilities.
- ✓ Redefine and quickly demonstrate the value of brand investments by connecting brand health to experience and business outcomes and driving delivery of experiences that support business goals.

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Recommended Gartner Research

- 🔍 [The State of Marketing Budget and Strategy in 2022](#)
Ewan McIntyre (G00761383)
- 🔍 [Use Customer-Directed Engagement Models to Earn First-Party Data for More Effective Personalization](#)
Amy Abatangle (G00761066)
- 🔍 [Rethink How to Match Marketing Operating Models to Capabilities](#)
Sally Witzky and Michael McCune (G00767195)
- 🔍 [Make the Most of Your Brand-Building Budget](#)
Communications Research Team (G00778235)
- 🔍 [A New Way to Measure Brand Health: From Brand Strategy to Business Outcomes](#)
Julie Reeves (G00761043)

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Webinar

The Gartner 2023 CMO Leadership Vision

Adapt your marketing strategies for efficient growth in a high-velocity world.



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Research

The Chief Marketing Officer Journal: Q4 2022

Uncover what current trends mean for CMOs and Marketing leaders in 2023.



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