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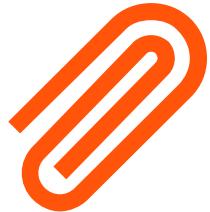
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The Gartner CMO Leadership Vision for 2022: 3 Key Trends



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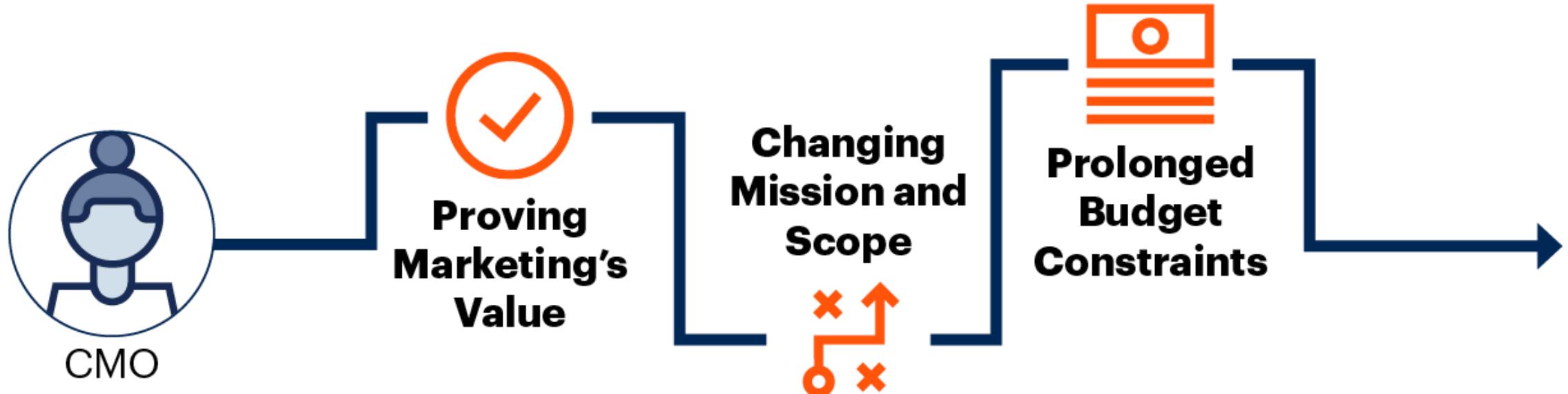




**CMOs Enter 2022 With
Their Role in Transition**

They Are Forging a Path to Tomorrow Amid Significant Challenges

Pressures Abound for CMOs



Source: Gartner

Key Issues

1. What are the major trends affecting CMOs?
2. What are CMOs' top priorities?
3. What actions should CMOs take to set their teams up for success?

Three Key Trends for CMOs in 2022

1

**Journeys Evolve
as Pandemic
Channel
Preferences
Persist**

2

**CMOs Cede
Accountability for
Digital Initiatives
as CEOs Focus on
Digital Growth**

3

**CMOs Lose
Resources as
Budgets Shift to
Enterprisewide
Digital
Investments**



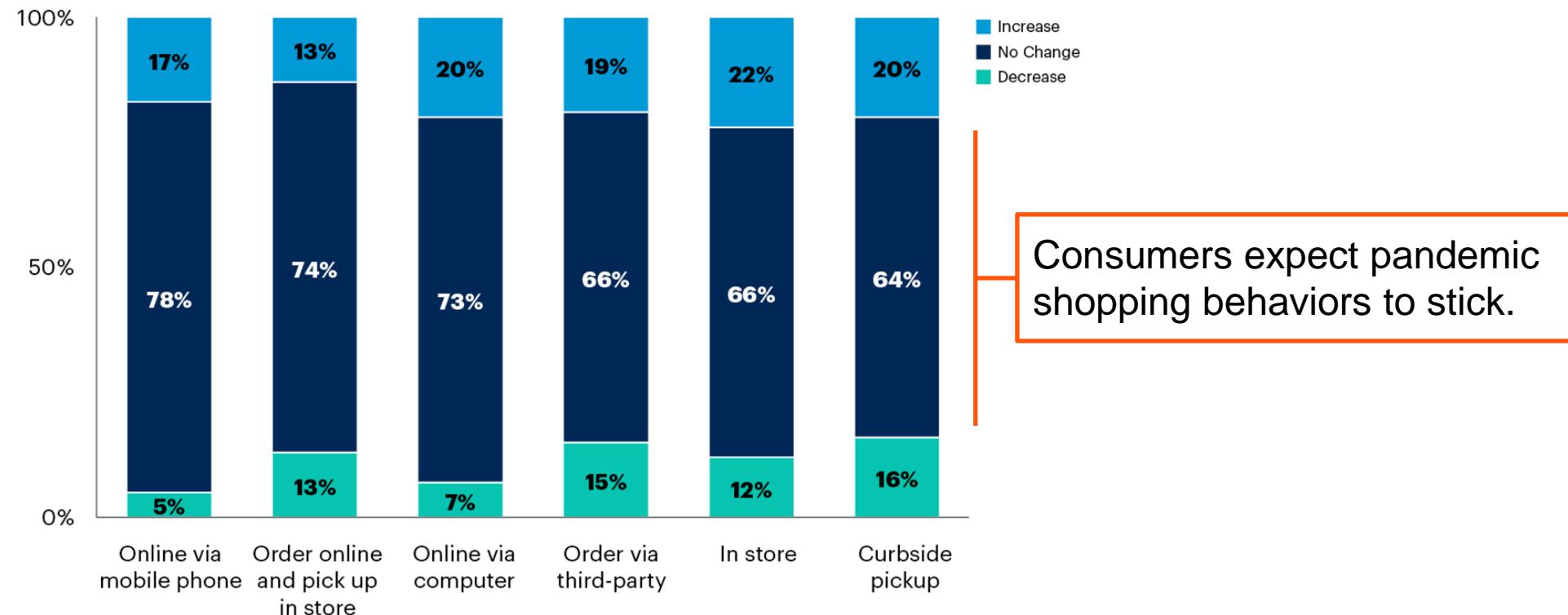
Journeys Evolve as Pandemic Channel Preferences Persist

**62% of CMOs changed their
channel priorities in 2021.**

Expect Evolving Consumer Engagement Patterns to Endure Post-Pandemic

Shopping Behavior Change Anticipated in the Next Three to Six Months

Percentage of Consumers



n = 255 U.S. consumers

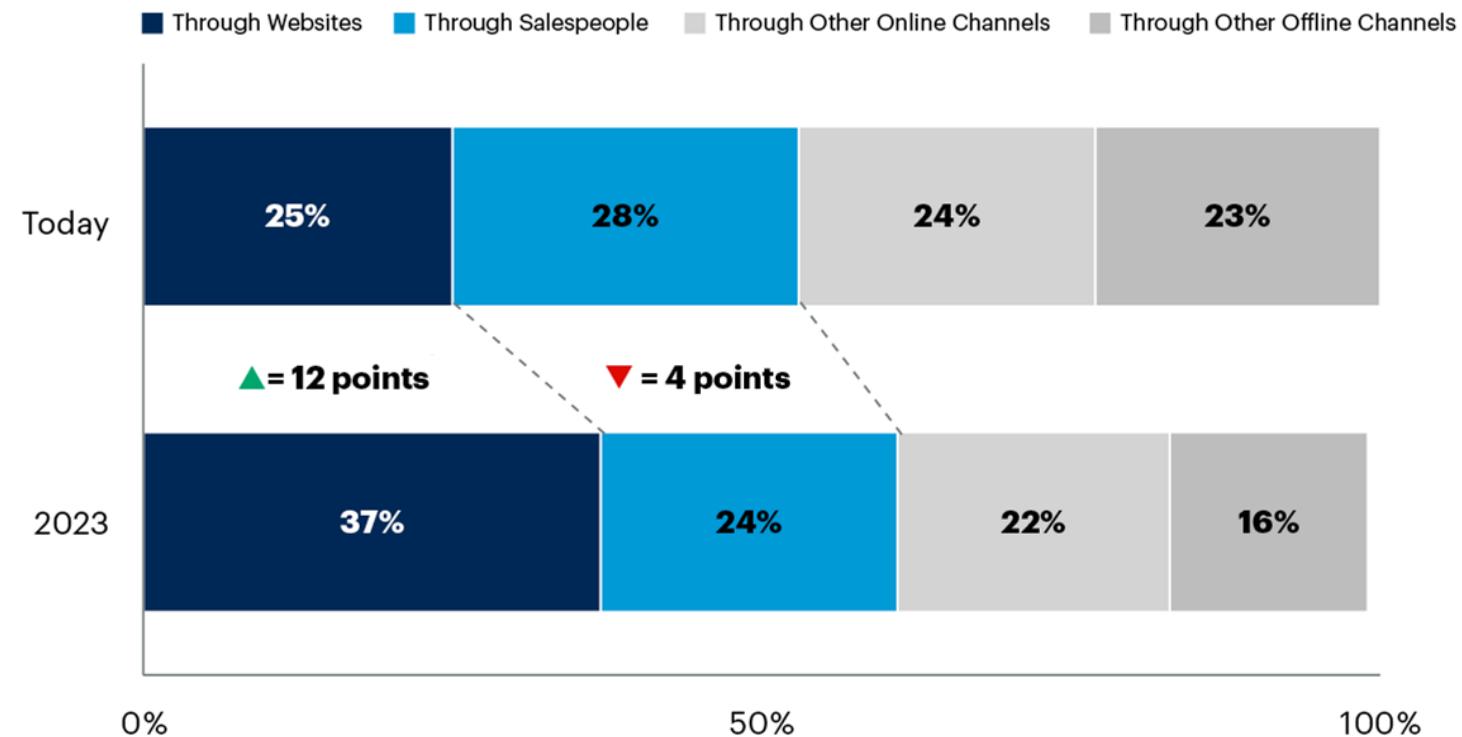
Q: Thinking about the frequency with which you shop in each of the following ways today, how, if at all, do you anticipate it to change in the next three to six months?
(excludes those who do not shop in that way)

Source: Gartner Consumer Community (March 2021)

Similar Disruptions Have Shifted B2B Buyer Journeys

Proportion of B2B Procuring by Channel Over Time

Mean Proportion

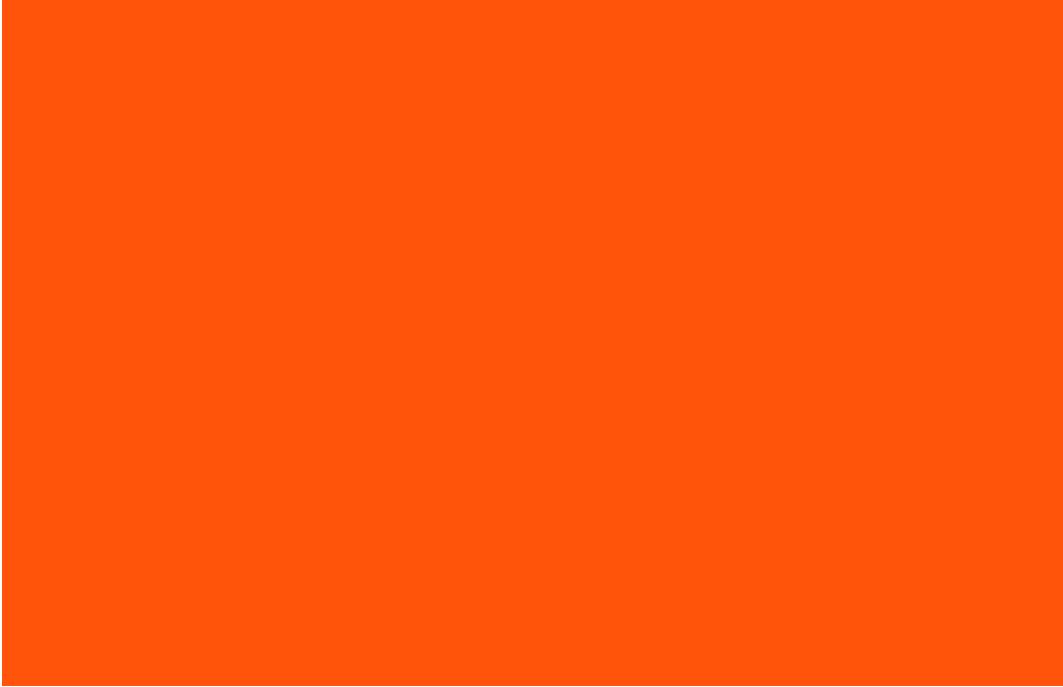


n = 191 respondents involved in B2B procuring

Q: What proportion of B2B procuring takes place through each of the following channels today? By 2023?

Source: 2020 Gartner B2B Digital Commerce Survey

Note: Percentages may not add to 100 due to rounding.



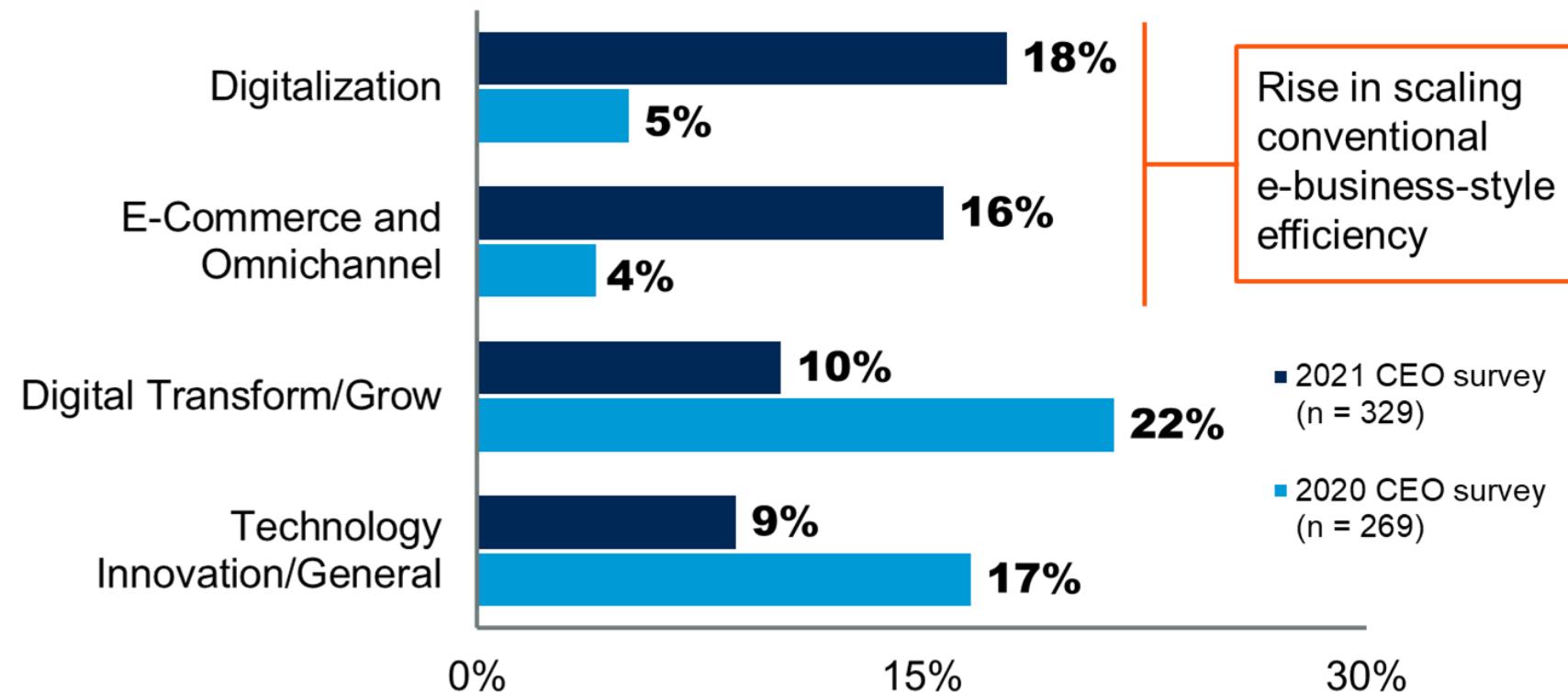
CMOs Cede Accountability for Digital Initiatives as CEOs Focus on Digital Growth

70% of CEOs plan to use the pandemic as an opportunity to redesign the business.

Digitalization Is Seen as a Key Growth Driver for Enterprise Organizations

Business Priorities 2021/2022 — Technology

Percentage of Mentions Within Category



n = 305; 298, All Respondents

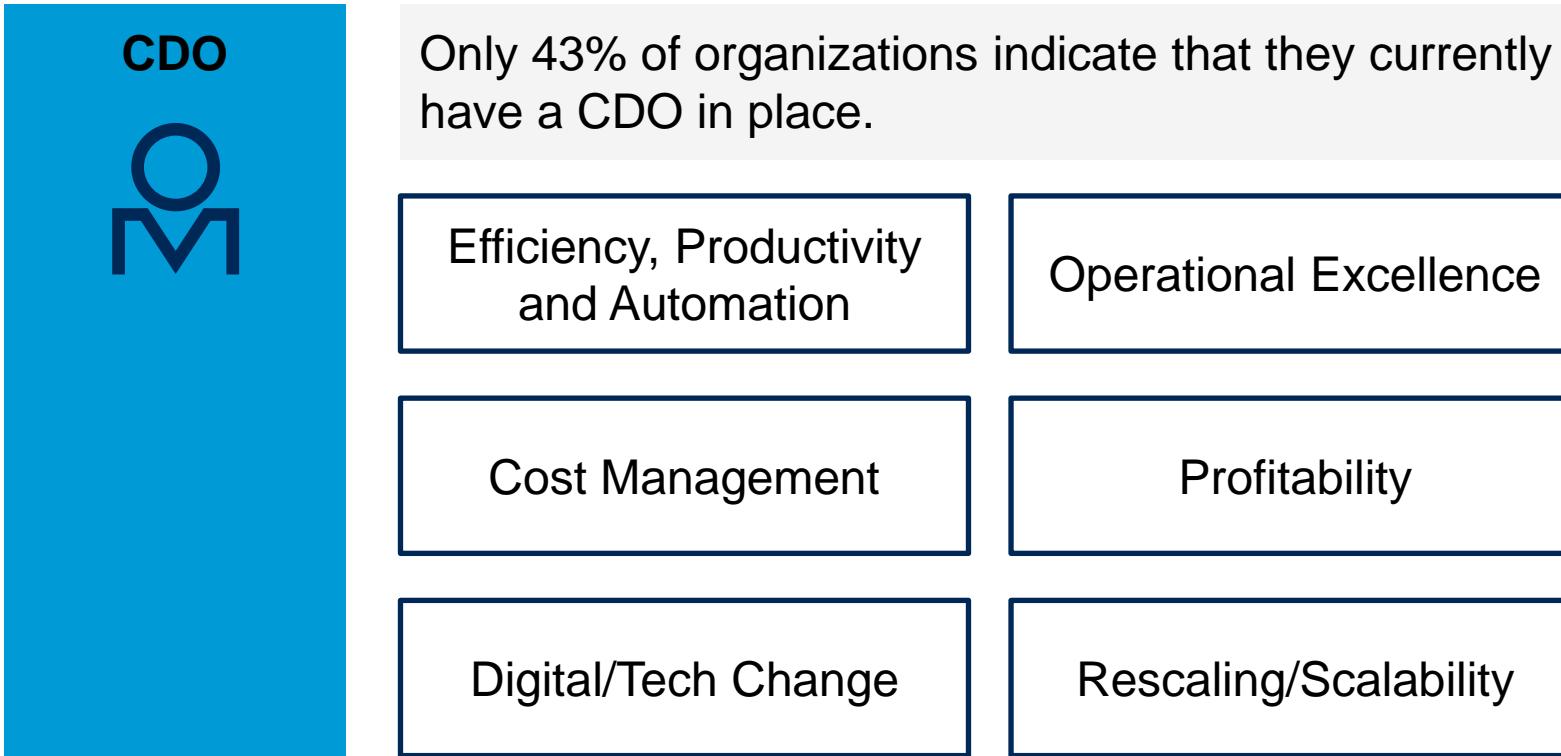
Q: To start, please tell us about your organization's top 5 strategic business priorities for the next 2 years (2021/2022)

Source: 2021 Gartner CEO and Senior Business Executive Survey

CEOs prioritize e-business and efficiency in their quest for profitable growth.

CMOs Cede Accountability for CX, Innovation and Digital Commerce to Other C-Suite Roles

CEOs' Top Focus Areas for CDOs



n = 465, All Respondents

Q: What is the number 1 issue you or your CEO is pushing each of your executives to focus on, within their respective functional specialism?
Source: 2021 Gartner CEO and Senior Business Executive Survey

Polling Question 1 of 2

How would you characterize marketing's role within the enterprise over the last 24 months?

- A. **Marketing has more influence now than it did before the pandemic**
- B. **Marketing has about the same influence as it did before the pandemic**
- C. **Marketing has less influence than it did before the pandemic**

How to participate in our polling

If you are in full screen mode – click Esc

The poll question is on the “Vote” tab.

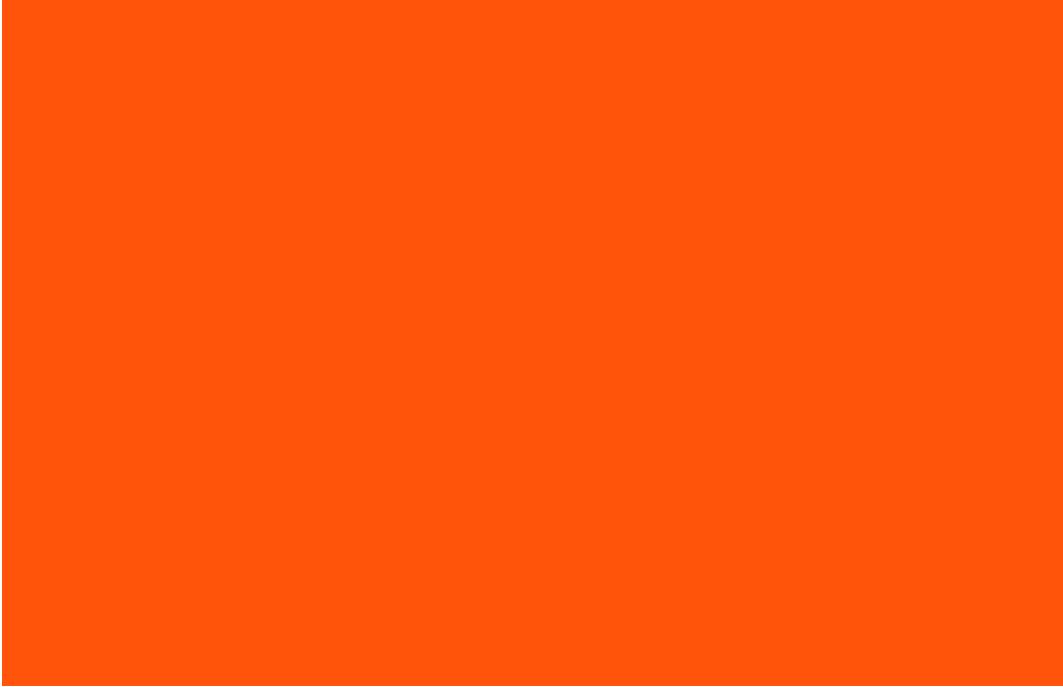
Please click the box to make your selection.

Upon voting you will see the results.

Thank you!

The image shows a poll interface with the following elements:

- Header buttons: Ask a question, Attachments, **Vote** (highlighted with a green border), Rate this, Details.
- Question text: Q. Polling Question (please choose 1 answer)
- Answer options:
 - A. Answer
 - B. Answer
 - C. Answer



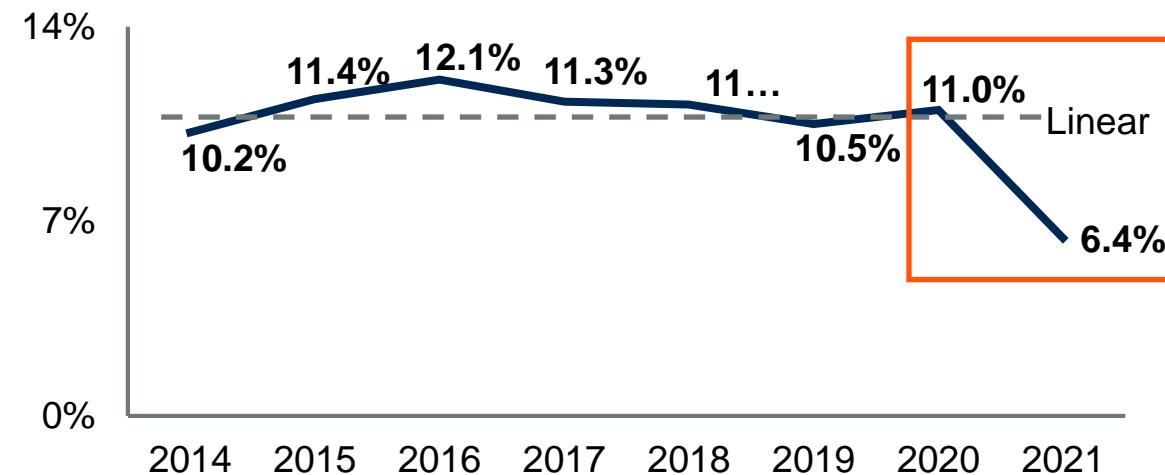
CMOs Lose Resources as Budgets Shift to Enterprisewide Digital Investments

83% of CEOs intend to increase spending on digital capabilities, but only 46% intend to increase marketing spend.

Pandemic-Driven Budget Cuts Have Put Marketing Budgets in the Doldrums

2021 Marketing Budgets

Mean Percentage of Company Revenue Shown

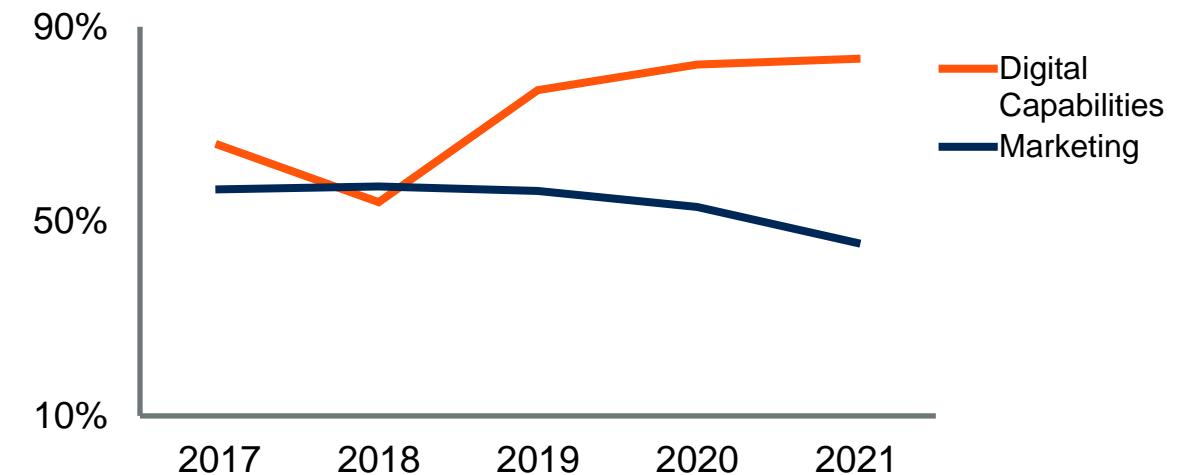


n = 400 Marketing leaders (2021); 342 (2020); 342 (2019); 618 (2018); 350 (2017); 375 (2016); 424 (2015); 363 (2014), excluding Don't know

Q4a. What percentage of your revenue is allocated to your total marketing expense budget for the current fiscal year?

Source: 2021 Gartner CMO Spend Survey

Investment Increases Year-Over-Year Change



n = 465, All Respondents

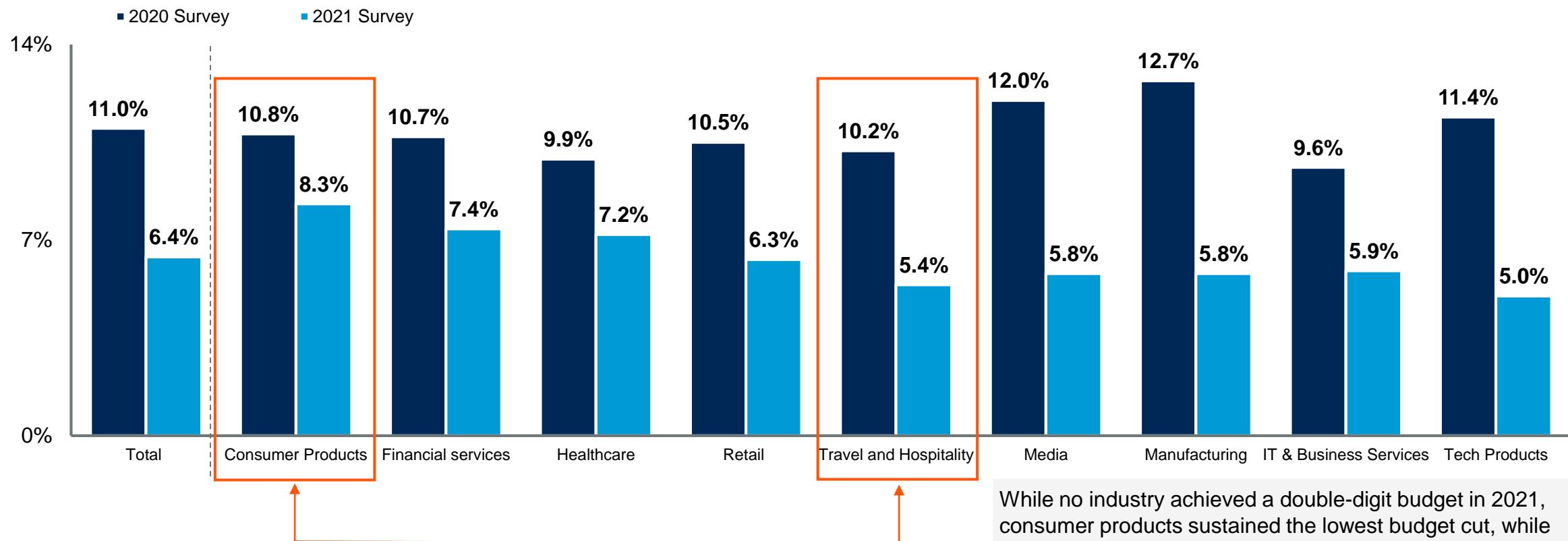
Q: Compared to fiscal year 2020, how will your organization's investments in the following business areas change in fiscal year 2021?

Source: 2021 Gartner CEO and Senior Business Executive Survey

All Industries Are Feeling the Pinch — Even Those That Experienced Positive Business Performance

Percentage of Revenue Allocated to Marketing 2020 vs. 2021

Mean Percentage of Budget Shown



n = 400 marketing leaders (2021); n = 342 (2020). Bases sizes vary by industry.

Q. What percentage of your revenue is allocated to your total marketing expense budget for the current fiscal year?

Source: Gartner CMO Spend Survey, 2021

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While no industry achieved a double-digit budget in 2021, consumer products sustained the lowest budget cut, while respondents from travel and hospitality reported a reduction from 10.2% of company revenue in 2020 to 5.4%.

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Key Issues

1. What are the major trends affecting CMOs?
2. What are CMOs' top priorities?
3. What actions should CMOs take to set their teams up for success?

Top Priorities for CMOs in 2022

1

Rebuilding the Marketing Engine for Flexibility in a Changing Environment

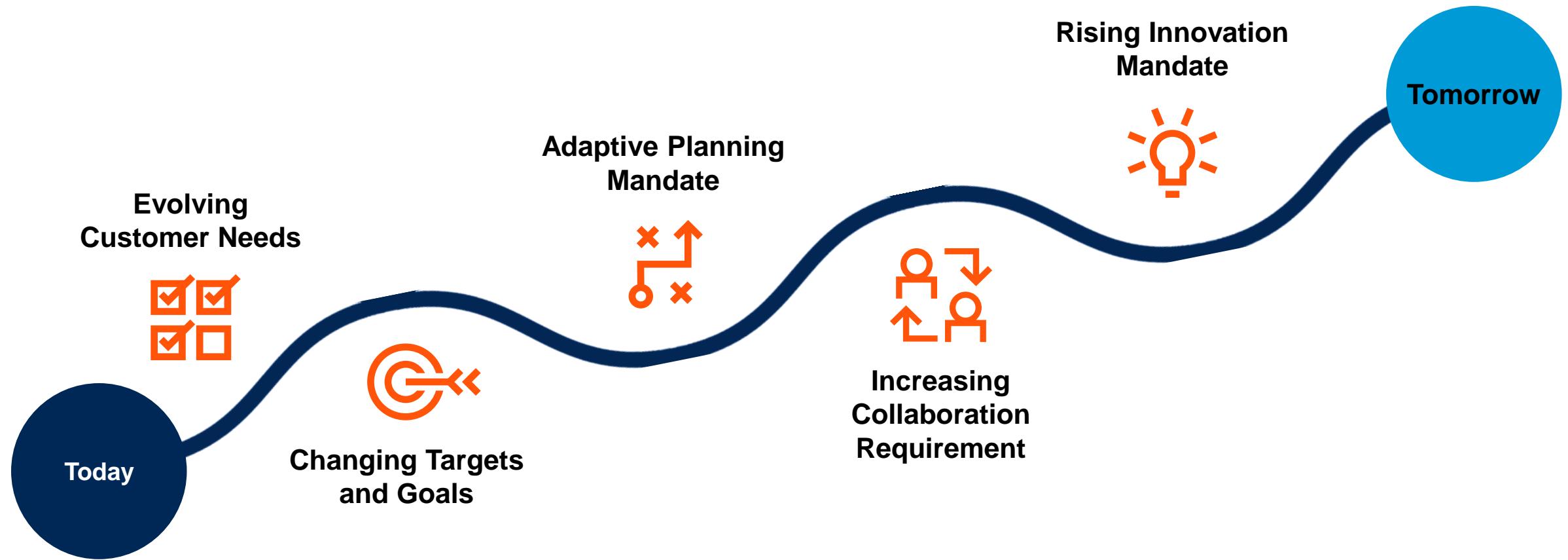
2

Reasserting Marketing's Orchestrator Role to Avoid Further Loss of Influence

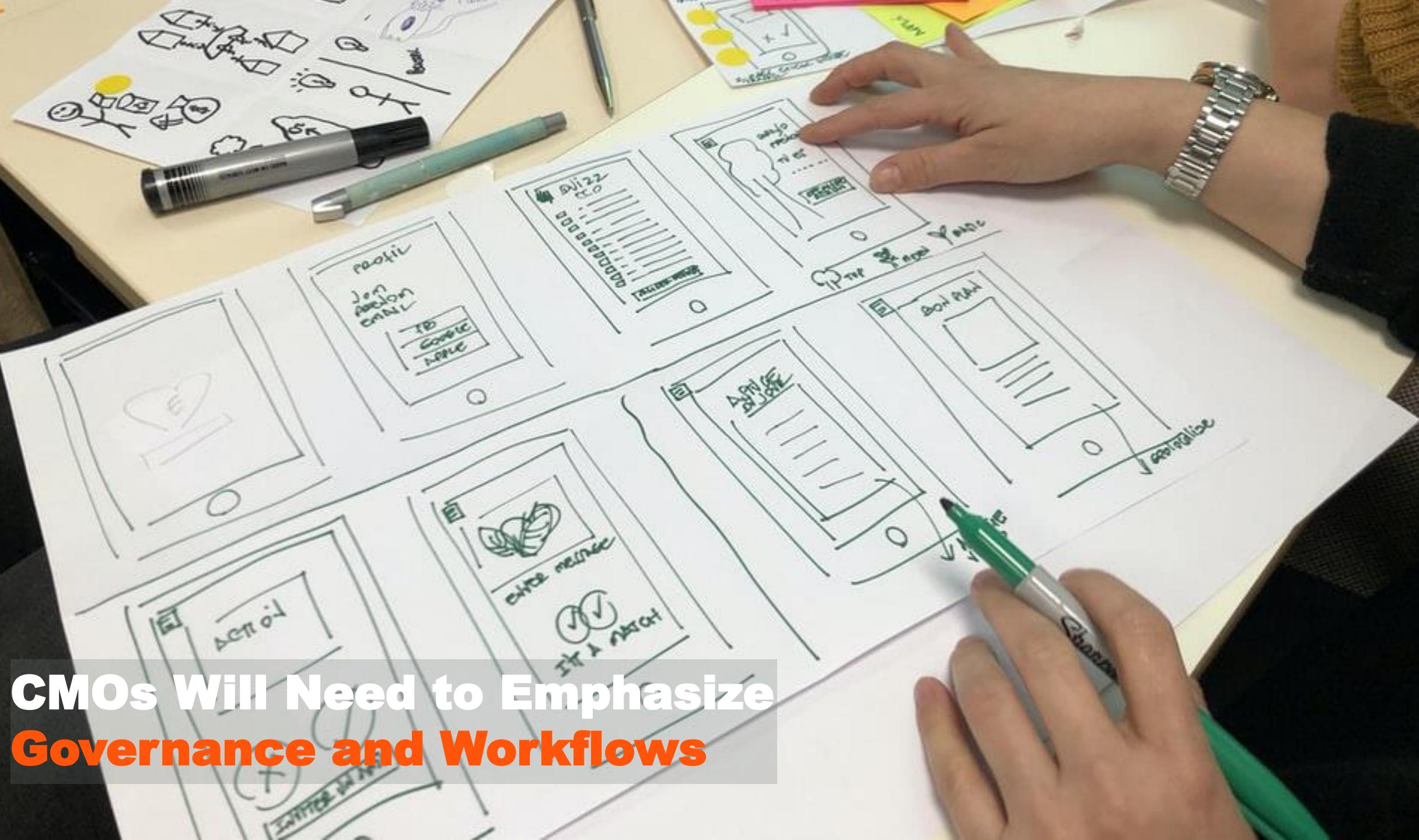
3

Executing Adaptive Strategies That Prove Marketing's Value to the Enterprise

Rebuilding the Marketing Engine for Flexibility in a Changing Environment

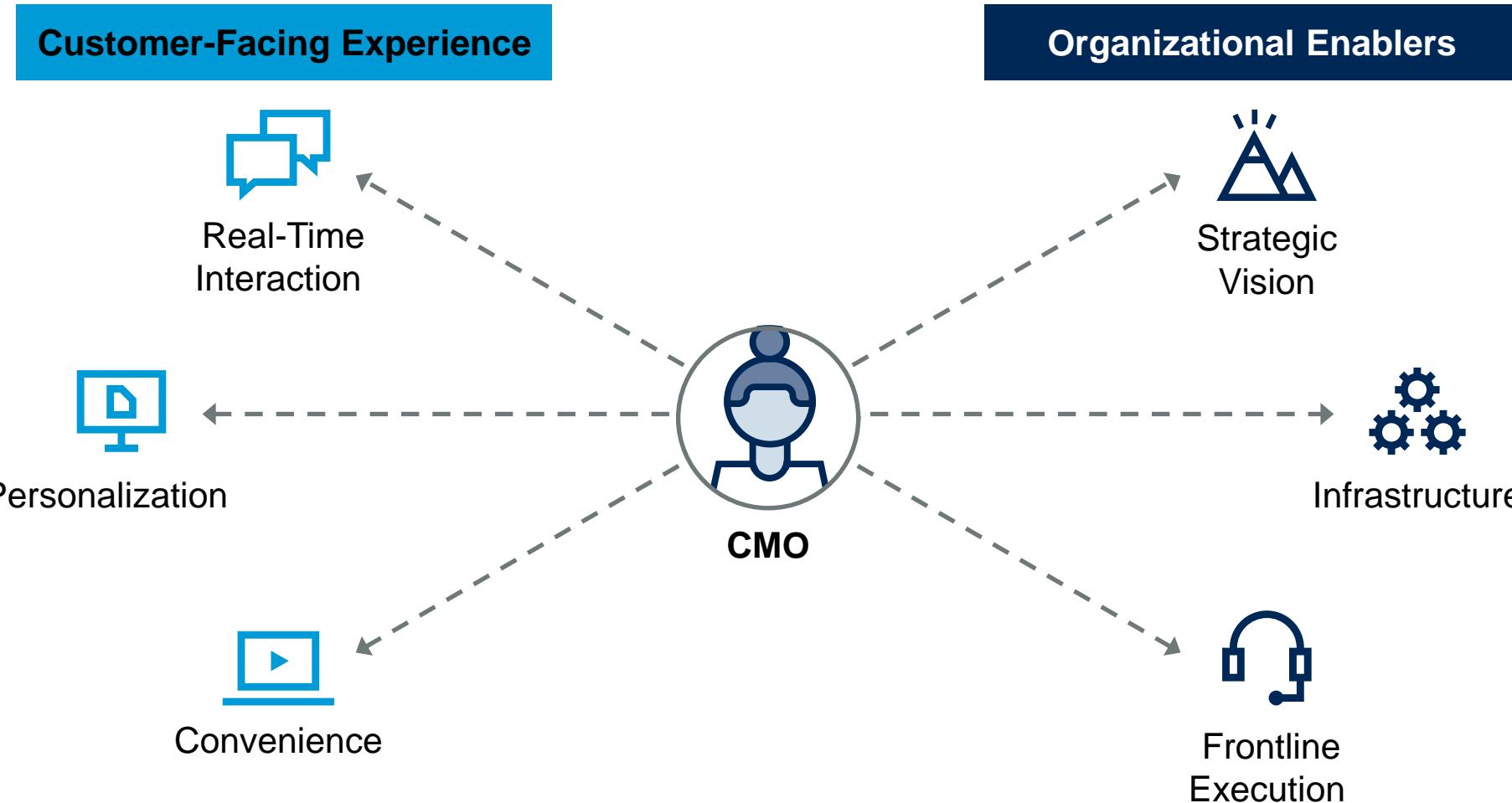


Source: Gartner



**CMOs Will Need to Emphasize
Governance and Workflows**

Reasserting Marketing's Digital Orchestrator Role to Avoid Further Loss of Influence



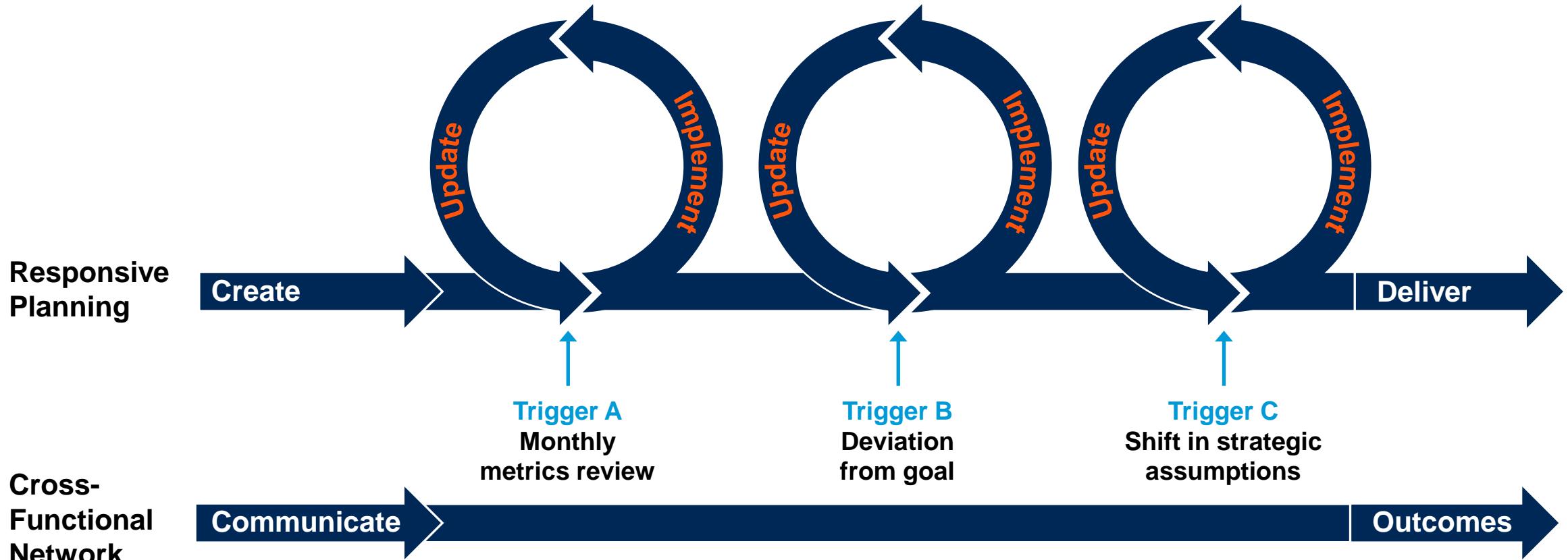
Source: Gartner



The CMO's biggest challenges will come from **within the organization.**

Executing Adaptive Strategies That Prove Marketing's Value to the Enterprise

CMOs need a more agile planning approach that adapts to fast-moving business priorities and reflects their participation in cross-functional networks.



Source: Gartner

Cross-Functional Collaboration Is Key to the CMO's Success



Polling Question 2 of 2

How effective is your marketing organization at linking marketing investments to business goals?

- A. We always demonstrate a clear and unambiguous link between marketing investments and business goals
- B. We are sometimes able to link marketing investment with business goals
- C. Our measurement capabilities are nascent, meaning we infrequently link marketing investment to business goals
- D. We are not able to link marketing investment to business goals

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Please click the box to make your selection.

Upon voting you will see the results.

Thank you!

Ask a question	Attachments	Vote	Rate this	Details
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Q. Polling Question
(please choose 1 answer)

- A. Answer
- B. Answer
- C. Answer
- D. Answer

Key Issues

1. What are the major trends affecting CMOs?
2. What are CMOs' top priorities?
3. What actions should CMOs take to set their teams up for success?

Actions CMOs and Their Teams Should Take Now to Be Successful in 2022

1

Prepare for the Future of Hybrid Marketing

2

Redefine the CMO's Role as the Organization's "Chief Connecting Officer"

3

Build Holistic Measurement Based on the Varying Dimensions of Marketing Value

Prepare for the Future of Hybrid Marketing



CMOs must take an adaptive, agile approach to marketing strategy, budgeting and planning.



CMOs need to adopt an integrated, channel-agnostic, hybrid approach to marketing activation.



CMOs should create a diversified digital experience portfolio that shapes customer journeys.

Source: Gartner



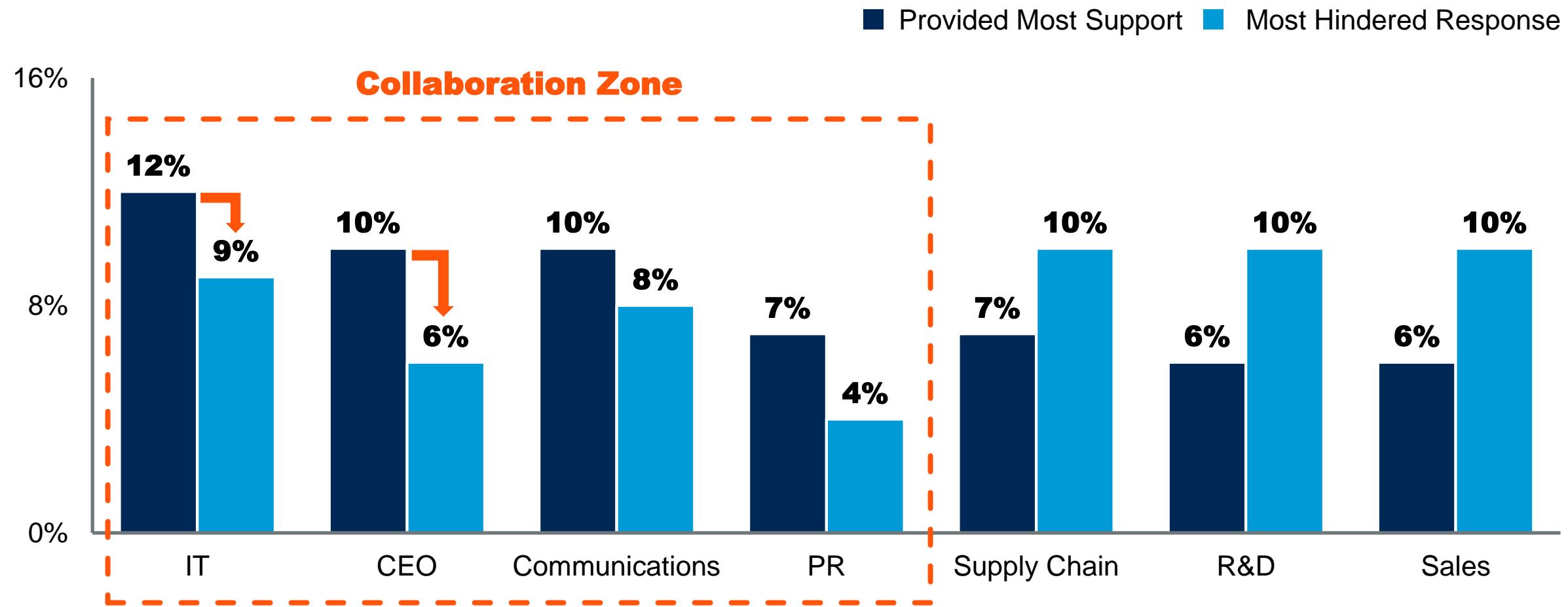
Marketing must accelerate the enterprise's ability to prioritize where to intervene in the customer journey.

Redefine the CMO's Role as the Organization's "Chief Connecting Officer"



Source: Gartner

Look for Opportunities in the Collaboration Zone



n = 350 digital marketing leaders

Q: Which of the following roles/functions provided the most support for the marketing organization's response to disruptive events in 2020?

Q: Which of the following roles/functions most hindered the marketing organization's response to disruptive events in 2020?

Source: 2021 Gartner Digital Marketing Survey.

Build Holistic Marketing Measurement

Hierarchy of Marketing Metrics



CMOs must bridge measurement gaps, making a clear and unambiguous connection between marketing's investments, activity and enterprise value.

Source: Gartner

**The Value of Marketing Is Based
on Perception, Requiring Emphasis
on Meaningful Measurement**



- **Prepare for the future of hybrid marketing** by defining how online and offline channels work symbiotically and taking an integrated approach to budgets, planning and activation.
- **Redefine the CMO's role** to be the organization's "Chief Connecting Officer," linking channels, experiences, employees and partners around a shared customer focus.
- **Build holistic marketing measurement**, focusing on return on investment and return on objectives shared with other stakeholders across the organization.



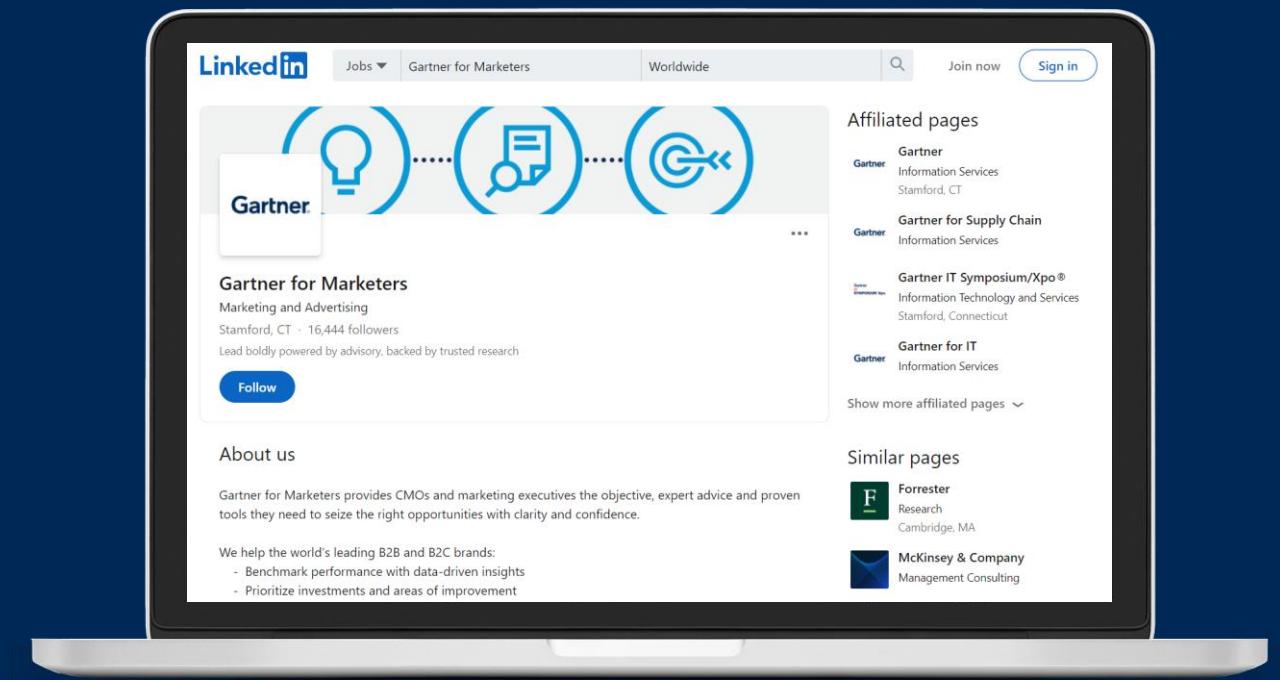
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