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# The Gartner CMO Leadership Vision for 2022: 3 Key Trends



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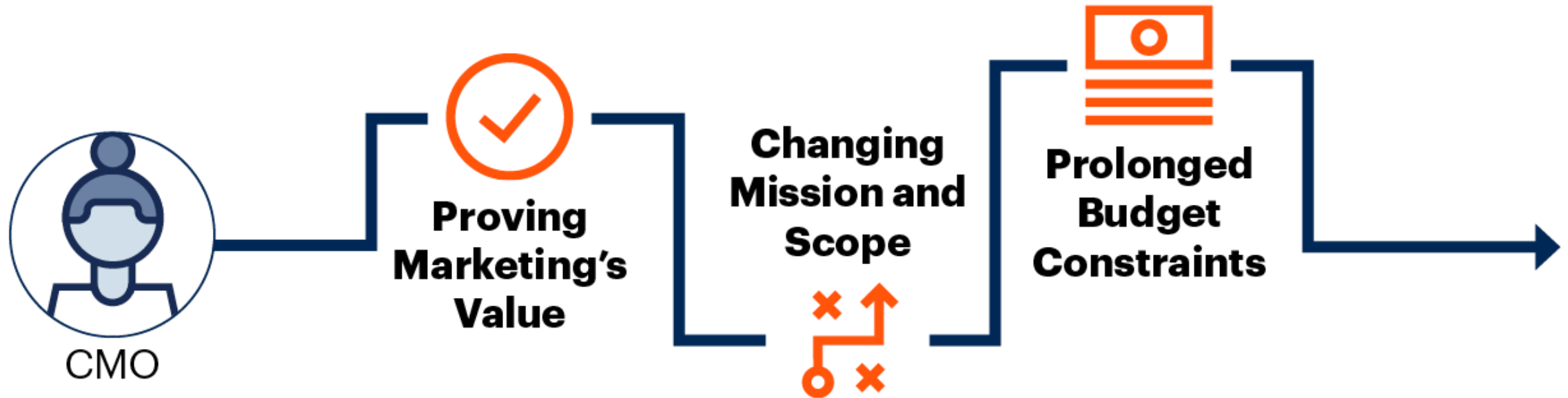


The background of the image is a close-up of dark, moist soil with several small, light-colored rocks scattered around. In the center, three maple leaves are arranged in a fan-like pattern. The bottom leaf is a vibrant green, the middle leaf is a bright yellow, and the top leaf is a deep red. The leaves are slightly overlapping, with the green leaf at the bottom, the yellow leaf in the middle, and the red leaf at the top.

# **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**



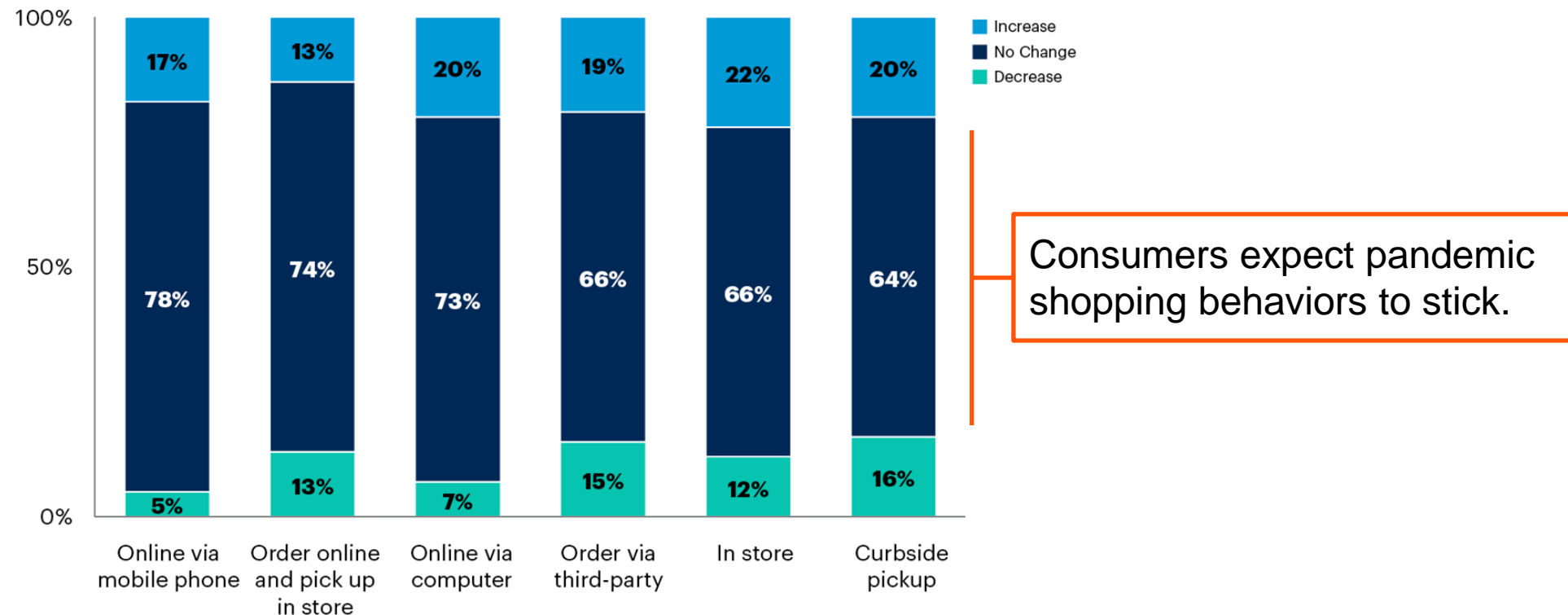


**62%** of CMOs changed their  
channel priorities in 2021.

# 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

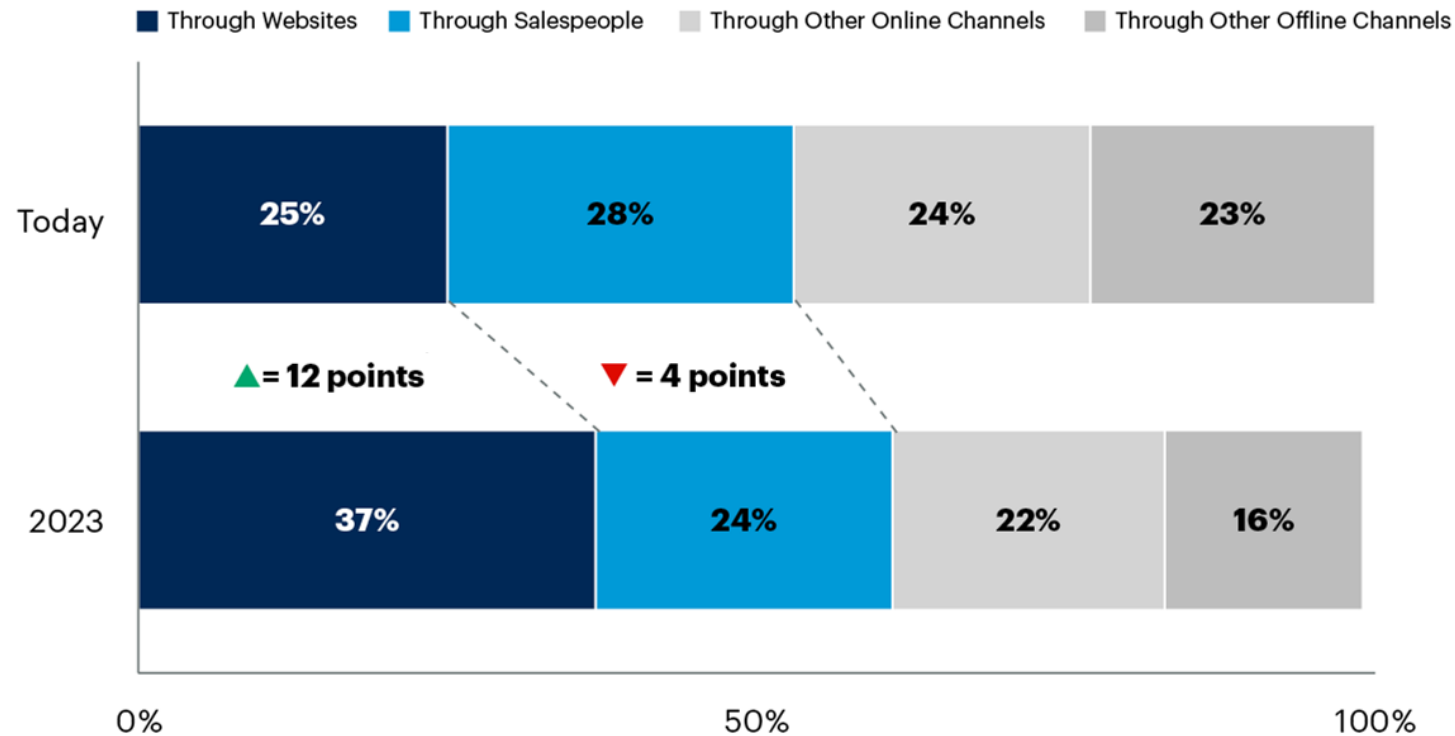
Q: Thinking about the frequency with which you shop in each of the following ways today, how, if at all, do you anticipate it to change in the next three to six months?

(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.



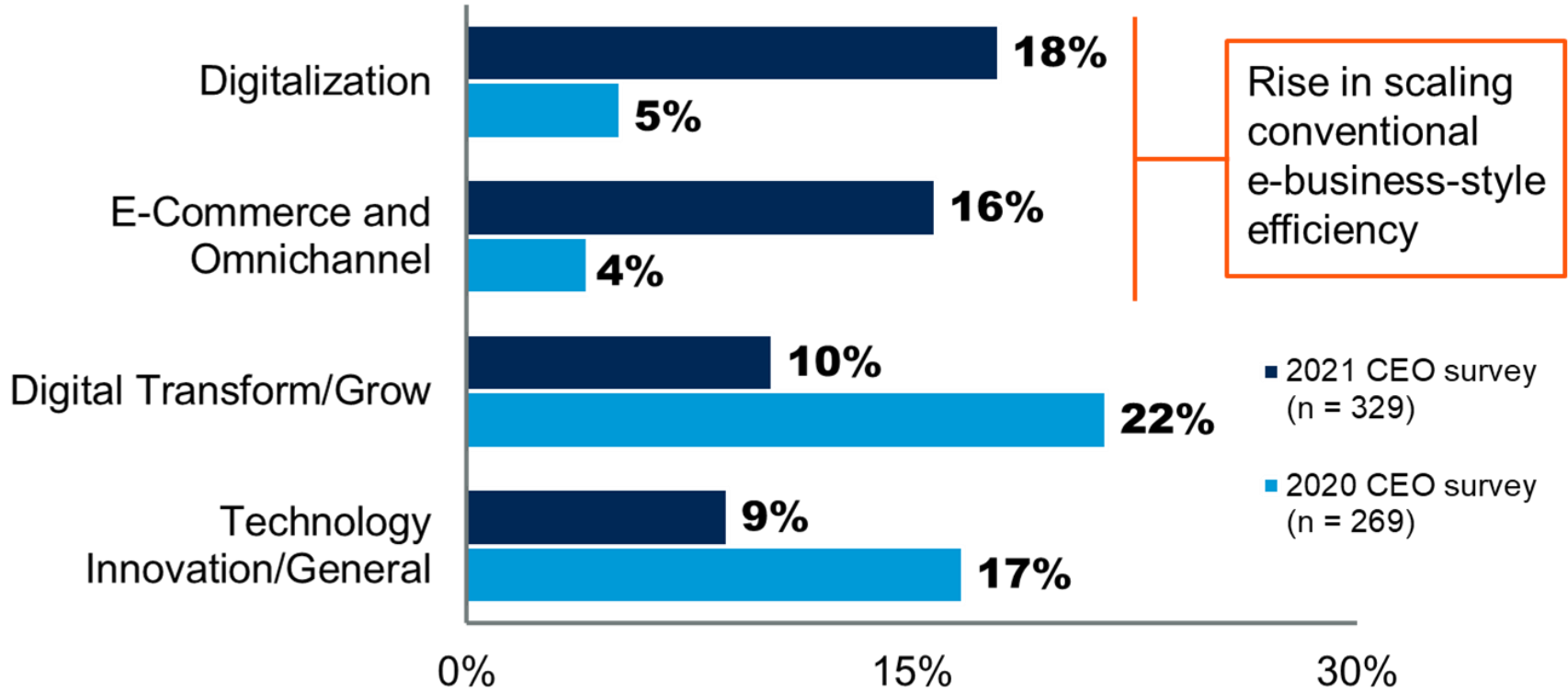
# **CMOs Cede Accountability for Digital Initiatives as CEOs Focus on Digital Growth**



**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*

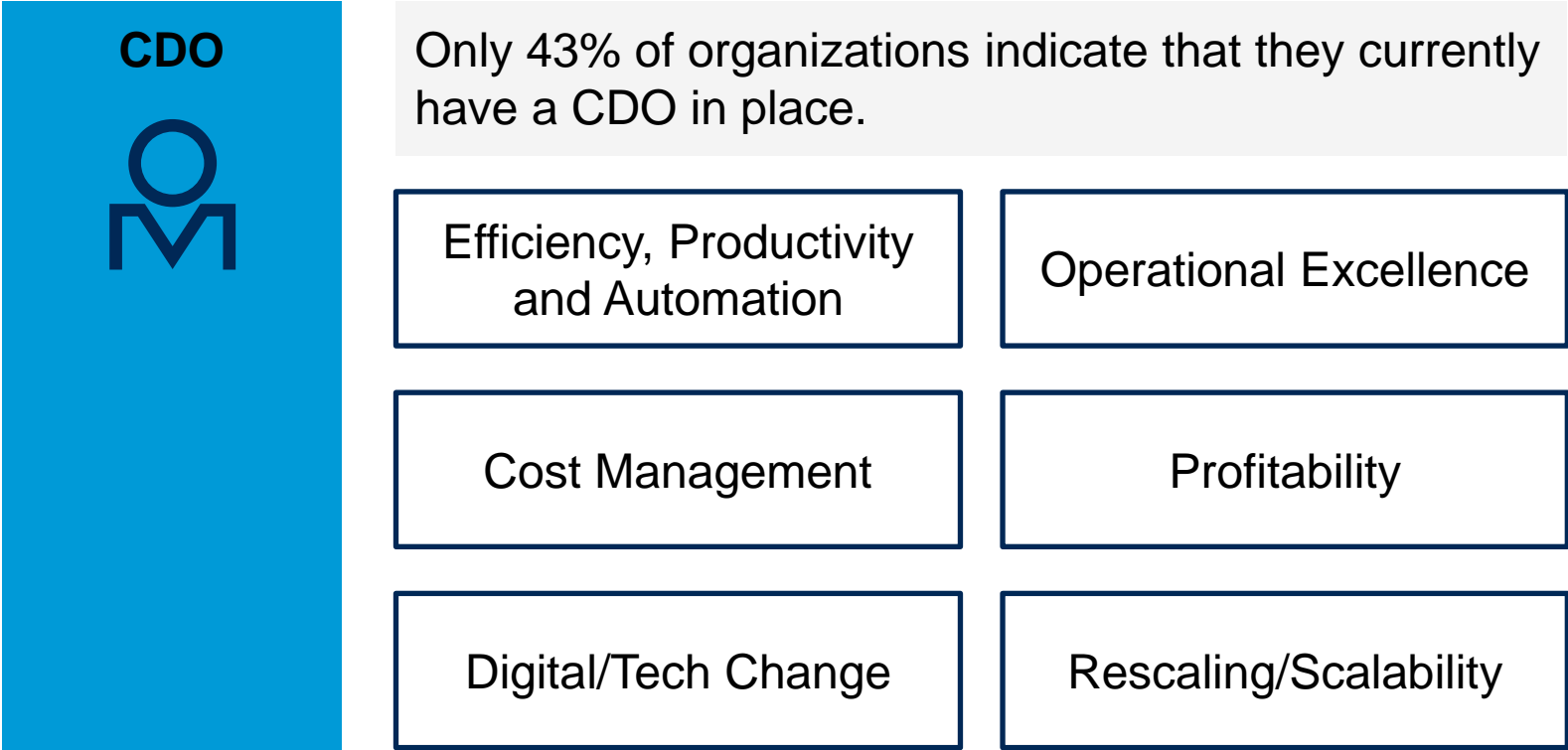


CEOs prioritize e-business and efficiency in their quest for profitable growth.

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

# 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 specialization?

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!

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

A. Answer	<input type="checkbox"/>
B. Answer	<input type="checkbox"/>
C. Answer	<input type="checkbox"/>



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

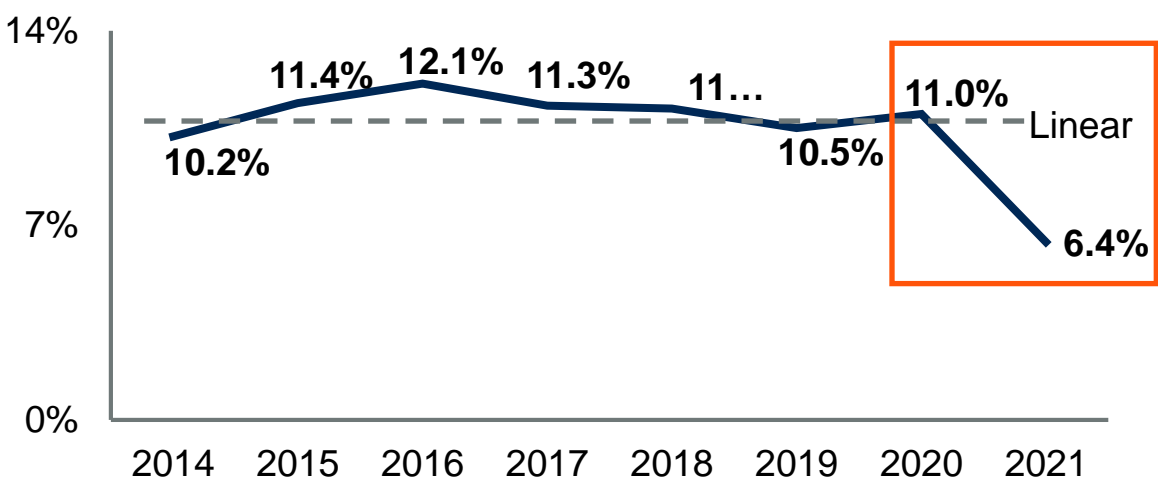


**83%** of CEOs intend to increase spending on digital capabilities, but **only 46%** intend to increase marketing spend.

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

## 2021 Marketing Budgets

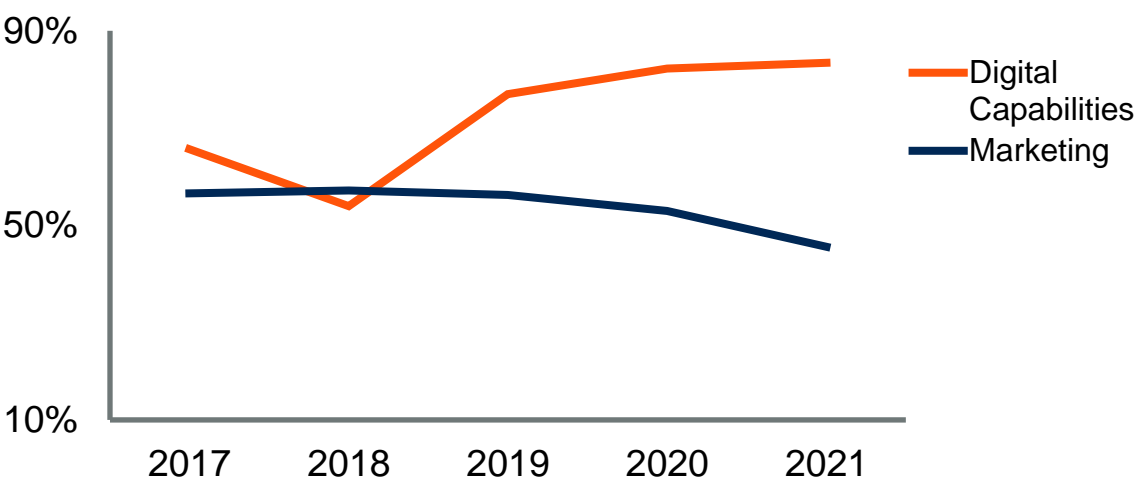
Mean Percentage of Company Revenue Shown



n = 400 Marketing leaders (2021); 342 (2020); 342 (2019); 618 (2018); 350 (2017); 375 (2016); 424 (2015); 363 (2014), excluding Don't know  
Q04a. 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

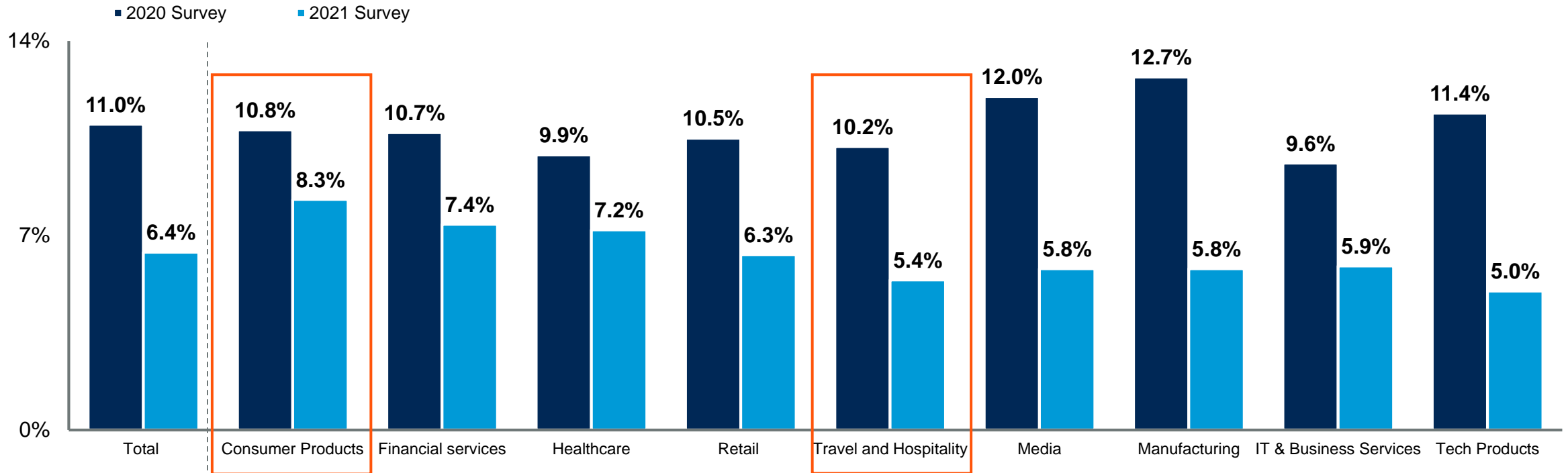
Year-Over-Year Change



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

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%.

# 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**

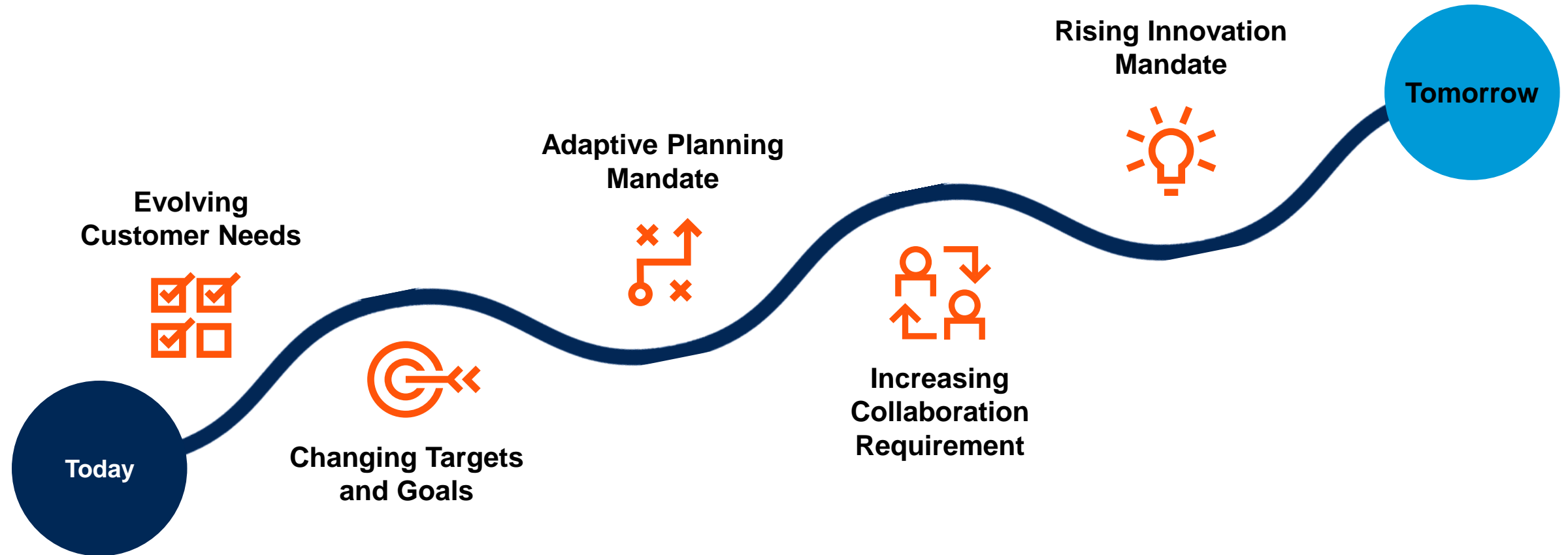
**Reasserting  
Marketing's  
Orchestrator Role  
to Avoid Further  
Loss of Influence**

**3**

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



# Rebuilding the Marketing Engine for Flexibility in a Changing Environment



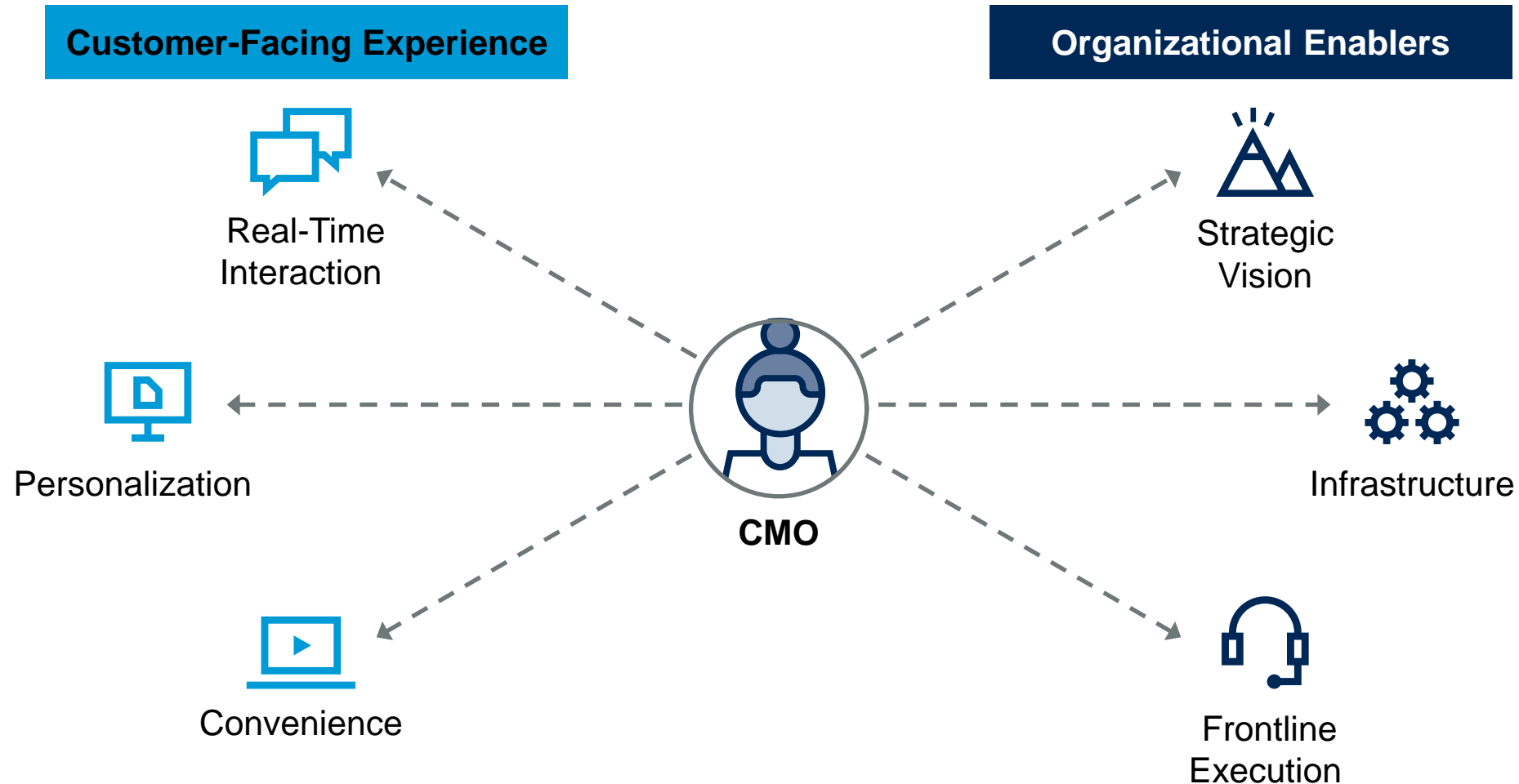
Source: Gartner



The image shows a top-down view of a person's hands sketching mobile app wireframes on a desk. The person is wearing a silver metal watch on their left wrist. Several hand-drawn wireframes are visible, including a profile page for 'Jon Pearson' with fields for 'ID', 'Google', and 'Name'; a page with a barcode and the text '000 000 000 000'; a page with a heart icon; a page with a leaf icon and the text 'after me'; and a page with a checkmark icon and the text 'It's a match'. A green Sharpie marker is being used to draw on one of the wireframes. In the background, there are other papers with sketches, a black Sharpie marker, and a green highlighter.

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

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



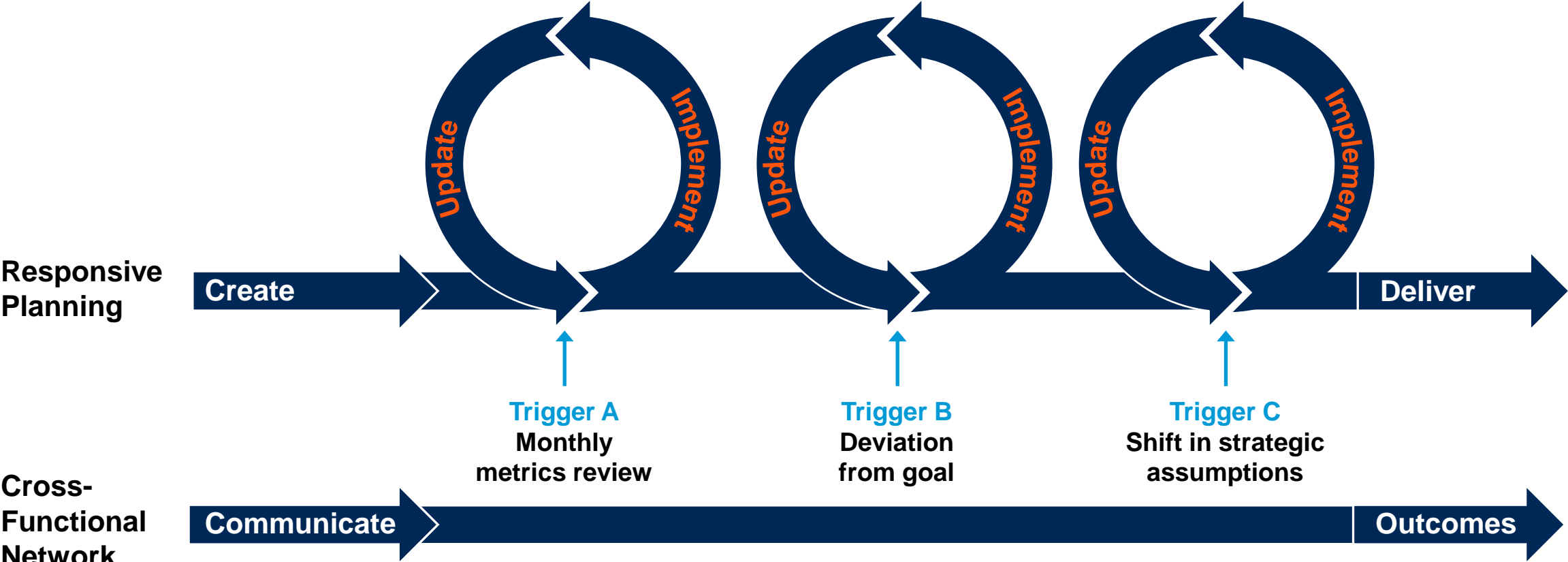
Source: Gartner



**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

## 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.

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Ask a question	Attachments	<b>Vote</b>	Rate this	Details
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(please choose 1 answer)

A. Answer	<input type="checkbox"/>
B. Answer	<input type="checkbox"/>
C. Answer	<input type="checkbox"/>
D. Answer	<input type="checkbox"/>



# Key Issues

1. What are the major trends affecting CMOs?
2. What are CMOs' top priorities?
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# **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



## Marketing Strategy

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



## Digital and Traditional Channels

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



## Customers



## Digital Experience

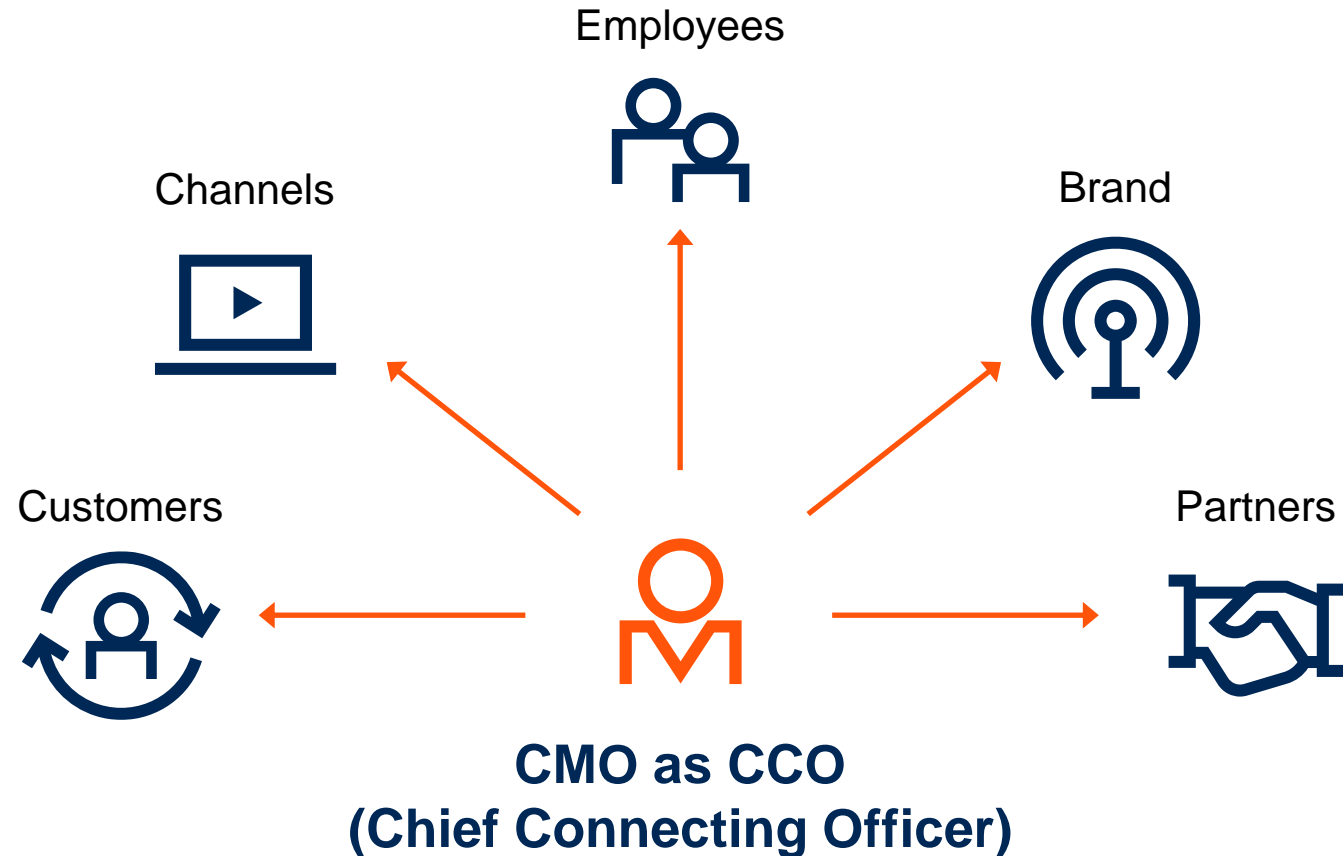
CMOs should create a diversified digital experience portfolio that shapes customer journeys.

Source: Gartner



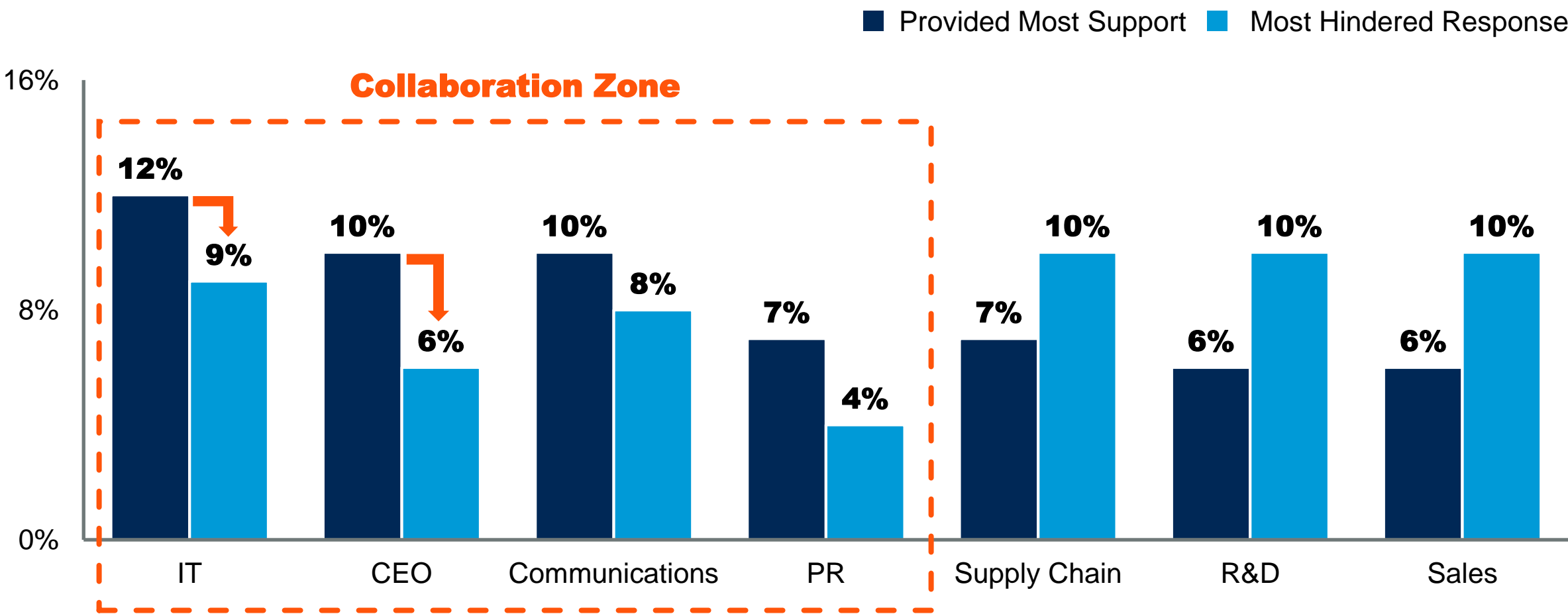
**Marketing must accelerate the enterprise's ability to prioritize where to intervene in the customer journey.**

# 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

	Decisions Supported	Role Supported	Granularity
Business Outcomes	Business Strategy	CEO, CMO and CFO	Low
Strategic Levers and Macro Performance	Marketing Strategy	CMO	Low
Operational Levers and Diagnostics	Marketing Planning and Campaigns	Marketing Management	Medium
Tactical Levers and Optimization	Campaign and Content Optimization	Campaign Managers, Analysts and Specialists	High

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.



# Ask your questions

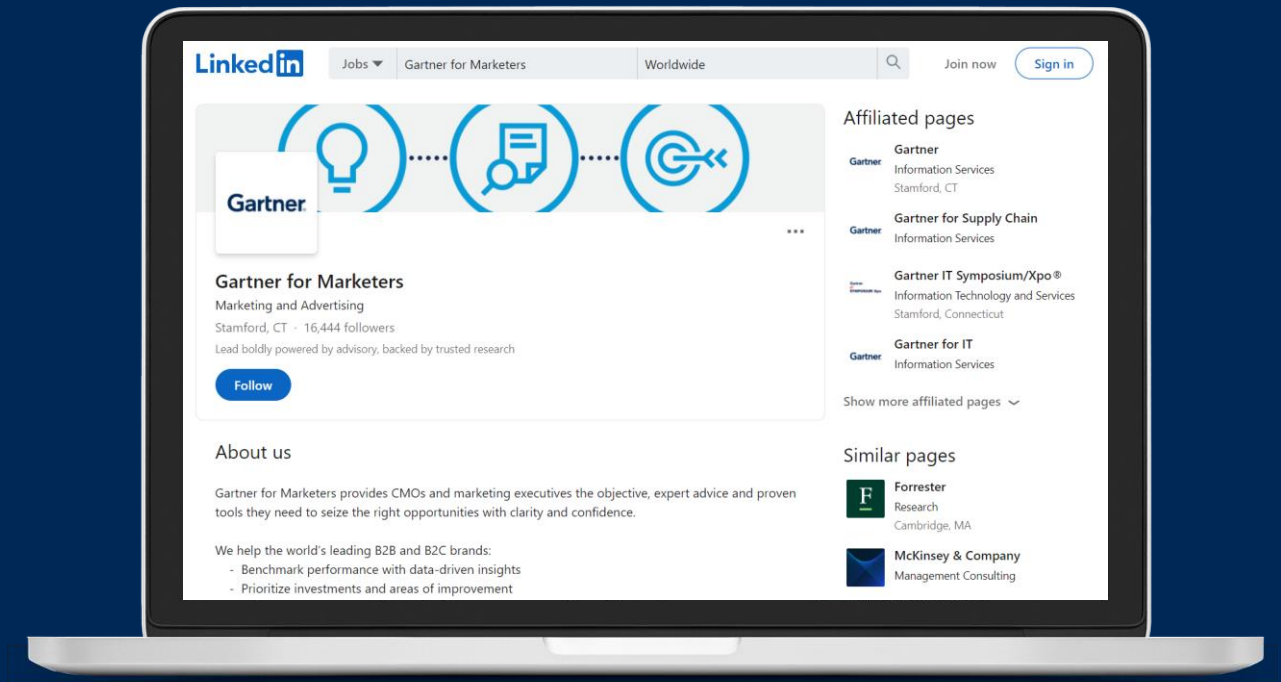


The image shows a web interface for asking questions. At the top, there are four tabs: 'Ask a question', 'Attachments', 'Rate this', and 'Details'. The 'Ask a question' tab is highlighted with an orange box, and an orange arrow points to it from the left. Below the tabs, the text 'Ask a question' is displayed. Underneath is a large text input area with a placeholder that says 'Type your question here...'. At the bottom right of the form, there is a 'Send Question' button, which is also highlighted with an orange box, and an orange arrow points to it from the left.

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