

NEWBASE

THE EVOLVING MARKETER

2018







THE EVOLVING MARKETER

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/// The Evolving Marketer

The escalating role of the CMO in the lift-shaft of business

Mike Jeanes

“The CMO controls and maintains the ‘lift-shaft’ of their organisation, positioned at the centre of the business, servicing many functions from ground level, to the top floor executive suite, with information flowing in and out at all levels.”

As businesses, technology and consumer behaviour evolve at pace, the role of the CMO adjusts in order to help their organisation stay ahead of the game, and meet changing customer demands and expectations. Today's CMOs must deliver a wide range of marketing functions from branding to promotions, content creation to distribution, and data analytics to overall marketing strategy. In addition, the CMO requires a full understanding of the technology stack, and the ability to make sense of data, to service the business efficiently, and provide insights that can deliver engaging, and relevant brand experiences to the consumer.

The CMO controls and maintains the ‘lift-shaft’ of their organisation, positioned at the centre of the business, servicing many functions from ground level, to the top floor executive suite, with information

flowing in and out at all levels. In order to satisfy such a diverse range of needs across multiple levels and departments, the CMO needs to be equipped with the tools, and the right team and resources to drive revenue, and lead their business through change and transformation. And in such a fast moving marketing environment, it is more important than ever for the CMO to build and nurture a strong relationship with their C-suite counterparts and encourage collaboration across multiple functions.

The Evolving Marketer is a global survey among CMOs that sets out to explore their changing role in business, key areas of focus and investment, and their relationships within their business at all levels, from the wider organisation, to the CEO.

The Expanding Role of the CMO

01

Expanding CMO Remit

The role of marketing is continually changing due to evolving technology. Over the past several years, the remit of the CMO and the marketing team has escalated significantly, from what was largely a promotions and creative role, to the centralised lift-shaft of the business, and the data driven link between the brand and the consumer. The Evolving Marketer shows that 82% of global CMOs agree that 'the level of influence that marketing has on the business has increased within their organisation in the last few years'. Increased influence brings expanded responsibility, and the role of today's CMO has become complex, spearheading a wide variety of budget responsibilities ranging from digital and innovation, to research and insight, customer experience to content. Their increased involvement in tech has added a new set of responsibilities to the CMO portfolio and businesses now expect the CMO to get involved in multiple disciplines. The CMO is now overseeing an average of 12 creative and MarTech areas, with 64% responsible for 10 or more.

“ The CMO is now overseeing an average of 12 creative and MarTech areas”

Looking at individual areas of budget responsibility (Figure 1), out of 24 marketing functions measured, digital marketing dominates the global CMO function list (85%), followed by marketing strategy (83%), advertising (81%), content marketing (79%) and branding (76%). The mid-table positioning of customer experience (54%) and data and analytics (51%) is a reflection of 'evolving' CMO involvement. Budget responsibility and involvement in both these areas are growing as technology continues to influence almost every part of the end-to-end customer journey.

Today's CMO is expected to have a detailed knowledge of the consumer and the business, and at the same time, a thorough understanding of both creative and analytical aspects of marketing. Many CMOs have built their marketing careers on either creative or digital foundations, and when asked to define whether they consider themselves to be 'creative-driven' (Creative CMO) or 'analytically minded' (Tech CMO), The Evolving Marketer identified a 50/50 split in the sample.

Figure 1: CMO budget responsibilities



Base: All global CMOs

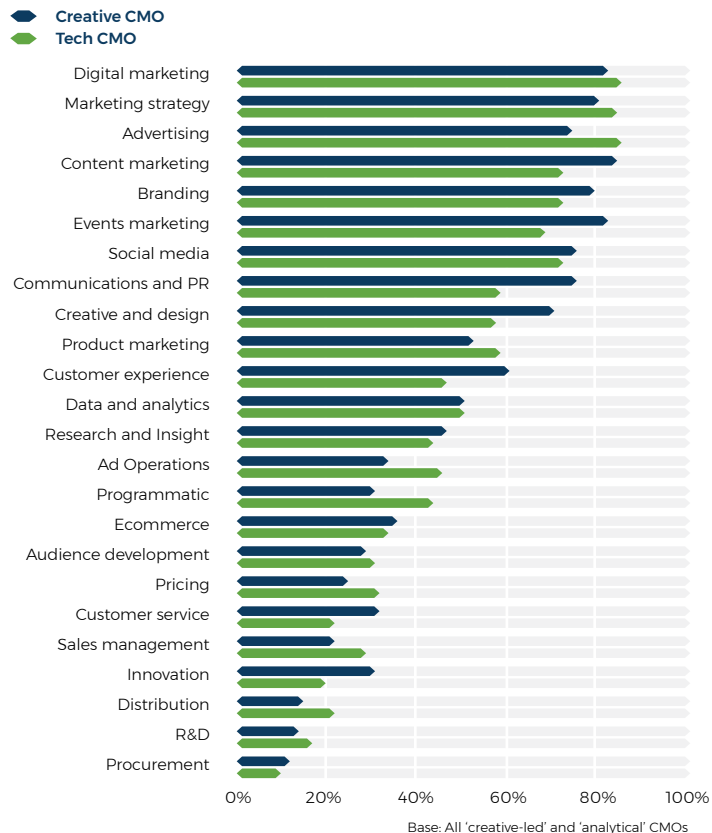
**Analytical or
Creative?**

The Tech and Creative Remit

Marketing used to be considered a creative function within business, but every investment is now measurable. Both the analytical (Tech) and Creative CMO needs to be digitally astute, fully immersed in the technology stack, and accountable for business results. The Creative CMO is more likely to have gained their experience in a more traditional marketing environment and whilst retaining these traditional skills, has expanded into the tech space and added more functions to their portfolio. This could explain why 71% of Creative CMOs are responsible for 10 or more marketing functions, compared to 58% of Tech CMOs.

Content marketing is the primary area of budget responsibility for the Creative CMO (85%), followed by digital marketing and events (both 83%), marketing strategy (81%), and branding (80%). Tech CMOs on the other hand are more likely to have built their experience around technology developments, analytics and data mining etc. They score more highly than the Creative CMO for the top three areas of overall budgetary responsibility (Figure 2). Digital marketing and advertising are the highest scoring marketing functions (both 86%), followed by marketing strategy (85%), and then a big step down to content marketing, branding and social media (all 73%). Importantly, the Tech CMO is more likely to be involved in sales and advertising processes including advertising, ad operations, programmatic and sales management.

Figure 2: Budget responsibilities of Creative and Tech CMOs



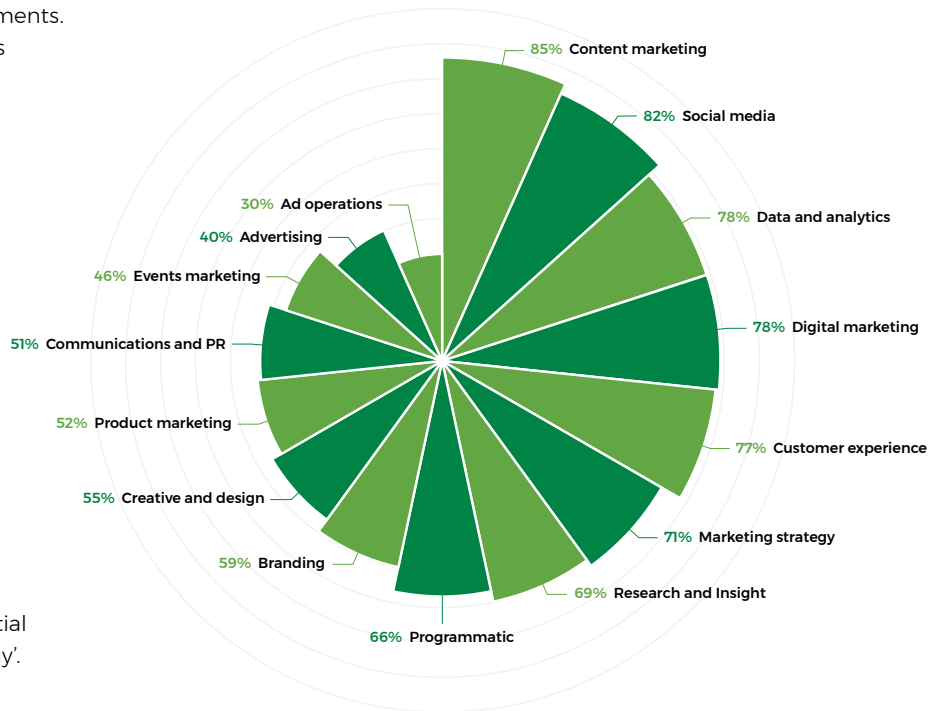
Growing Areas of Time and Investment

03

Growing Areas of Time and Investment

The role of the CMO has been transformed by data, analytics, information and tech advancements. In particular, cloud-based technology has enabled accessibility to the marketing systems and tools that allow the marketing team to access and mine data at speed. Consequently, the workload for the global CMO has escalated across almost all areas of marketing, making it increasingly challenging to serve their business across multiple-functions (Figure 3). With such a diverse and demanding mandate, it is not surprising that 61% of global CMOs consider the role of today's CMO to be complex, and almost half agree that 'Tech changes often make it difficult for the CMO to keep up'. But staying ahead of the game is an essential remit for the CMO, with almost all (97%) agreeing that 'It is essential to keep up with innovations in technology'.

Figure 3: Increasing CMO involvement



Base: All CMOs with budget responsibility of Top 15 marketing functions

The Evolving Marketer reveals that Content marketing is taking up an increasing amount of CMO time with 85% claiming that their involvement in this area has increased in the last 12 months, followed by social media (82%), digital marketing, data and analytics (78%), and customer experience (77%). Content marketing and customer experience are taking up more CMO time due to the increasing need to put the consumer at the centre of the business, and to connect brands with customers across an increasing number of channels and platforms. The growth in content marketing and customer experience, coupled with the CMO's increased involvement in data and analytics, is technologically dictating the experience the customer has with brands, and this growth trend is likely to continue.

In terms of where budgets are increasing, a mix of content, consumer and data related functions appear in the top 15. However, with high dependence on technology, and an increased need for market and consumer quantitative data, technology related marketing functions are in the top three areas of budgetary growth. Data and analytics registers the highest proportion of CMOs anticipating budget growth in the next 12 months (80%), followed by digital marketing (77%), social media (76%), and content marketing (72%). However, whilst proposed budget increases for data and digital functions are highest, the global CMO claims that, on average, over half the data available to the business is not being used to its full potential, and three quarters agree that they 'only exploit a small proportion of the data they have access to'.

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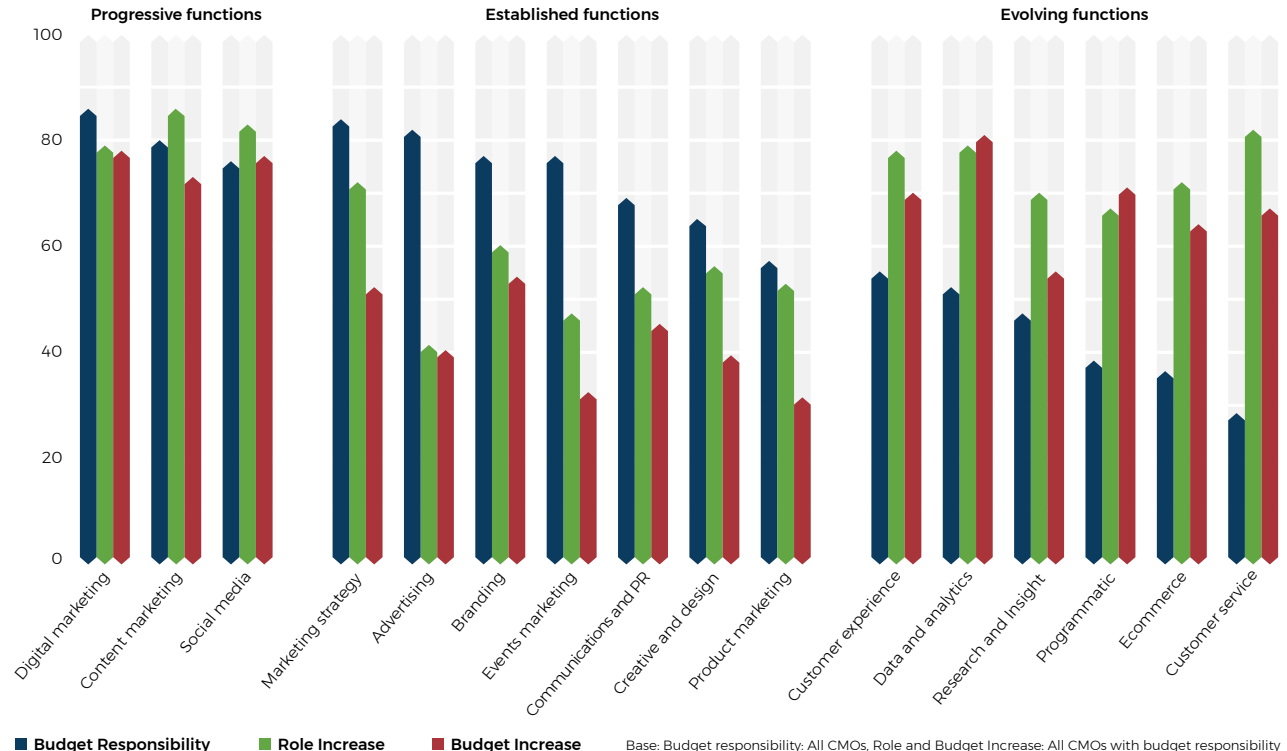
The marketing functions of the CMO can be grouped into three main categories; Progressive, Established and Evolving functions based on budgetary responsibility, the amount of time devoted to each function, and shifting budgets (Figure 4):

1. 'Progressive marketing functions': Where current CMO budget responsibility and the proportion expecting to increase spend are both high, and the amount of time devoted to these function is also growing strongly. Examples of these include social media, content marketing, and digital marketing.
2. 'Established marketing functions': Where CMO budget responsibility and time investment are both high, but the proportion expecting to increase budget is lower. These include advertising, branding, events marketing, product marketing, communications and PR, and marketing strategy.
3. 'Evolving marketing functions': Where the percentage of CMO budgetary responsibility is currently low, but time investment and increased budget levels are both high. Example functions include customer experience, data and analytics, research and insight, programmatic, Ecommerce and customer service.

This classification of marketing functions not only highlights where CMOs may have greater focus in the future (Evolving functions), such as programmatic, customer experience and data

and analytics, but also areas that may require greater investment, or where investment has been neglected (Established functions) including branding and product marketing.

Figure 4: Progressive, established and evolving marketing functions

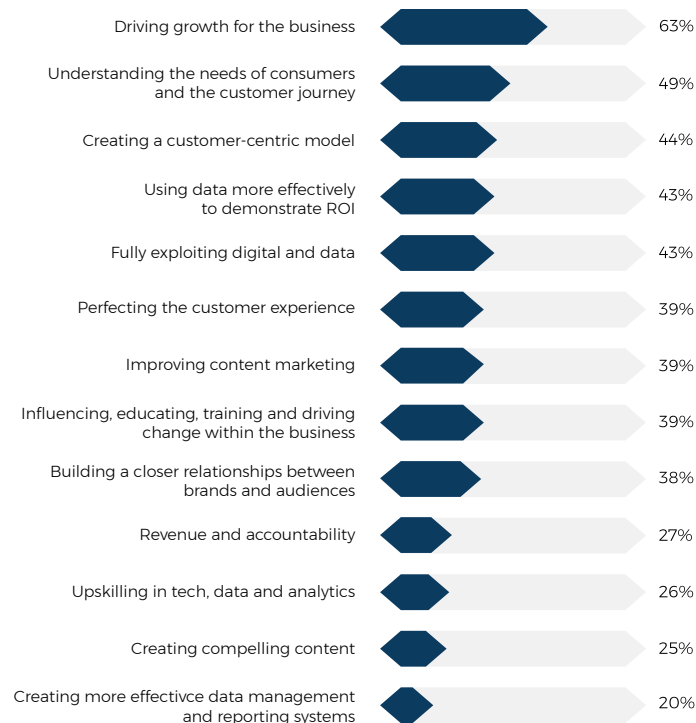


The CMO Agenda

The CMO Agenda

Today's CMO is now considered an accountable growth leader, with 82% agreeing that 'The role of the CMO has become more accountable and revenue focused'. The Evolving Marketer reveals five main themes on the global CMO agenda: revenue generation, consumer experience, data, content, and processes. Looking at the specific areas of focus in more detail, 'driving growth for the business' is the top priority with 63% considering this a main priority out of 13 areas measured (Figure 5). As the global CMO strives to deliver more actionable insights and a deeper understanding of audiences than ever before, 'understanding the needs of the customer and the customer journey' is the second highest area of focus (50%), followed by 'building a customer-centric model' (45%). These top three priorities are inherently linked, since the consumer is now influencing the marketing landscape and dictating the content types, products, and brands they engage with. Generating revenue and growing the business is the end result of mapping the customer journey, and creating a compelling customer experience. A customer-focused approach has moved centre stage in 2018, which explains why two thirds of global CMOs agree that 'marketing decisions should be based on how they impact the customer, rather than the business.'

Figure 5: CMO areas of focus in next 12 months



Base: All global CMOs

The next areas of focus on the CMO agenda are data driven, with 'using data more effectively to demonstrate ROI', and 'fully exploiting digital and data' both scoring 43%. These two priorities align with growing data and analytics budgets, and suggests that rather than a singular focus on accumulating more and more data, some of this additional budget should be set aside for deeper analysis, interpretation and implementation of existing data via a highly organised and efficient data stack. Importantly, data driven customer and revenue focused marketing goals cannot not be distracted by 'Shiny new toy syndrome' and this supports the fact that 74% of global CMOs agreeing that 'it is more important to refine data management and analytics systems than focus on the latest tech'.

The consumer is clearly at the heart of the global CMO agenda. Data and analytics helps brands understand the entire consumer journey and create a connected experience that drives brand engagement and consideration. Although 'perfecting the customer experience' ranks #6 on the global CMO marketing agenda, 93% agree (and 54% strongly agree) that the 'consumer experience is becoming increasingly important'.



The Creative CMO Agenda

The Creative CMO is often considered more traditional than the Tech CMO. Their role tends to be built on more classic marketing foundations of product marketing, communications, events and design. Arguably, working with data is not what creative marketers are known for, but understanding data and analytics is an essential requirement for today's CMO.

The agenda for the Creative CMO places the customer at the centre of marketing and the business, and is more focused on brand, content and customer experience. Whilst 'driving growth for the business' remains the main focus, the Creative CMO places a much greater emphasis on 'perfecting the customer experience' which is the second highest priority, scoring twice as high as the Tech CMO (53% vs. 25%). 'Understanding the needs of the consumer and the customer journey' and 'building a closer relationships between brands and audiences' also score more highly than their Tech counterparts (Figure 6).

With the dominant focus on data and analytics over the last few years, the marketing agenda is now shifting back to the consumer, and serving them with good, relevant and engaging content. Half of all global CMOs agree that 'creative and design has been neglected due to the increased focus on data'. But this is significantly higher for Creative CMOs (64%), compared to Tech CMOs (34%). With a re-focus on the consumer and creative, the Creative CMO is in a good position to apply their experience of storytelling, creative interpretation of data and copywriting to their evolving digital role - delivering content and creative that really connects with the consumer beyond spreadsheets and numbers.

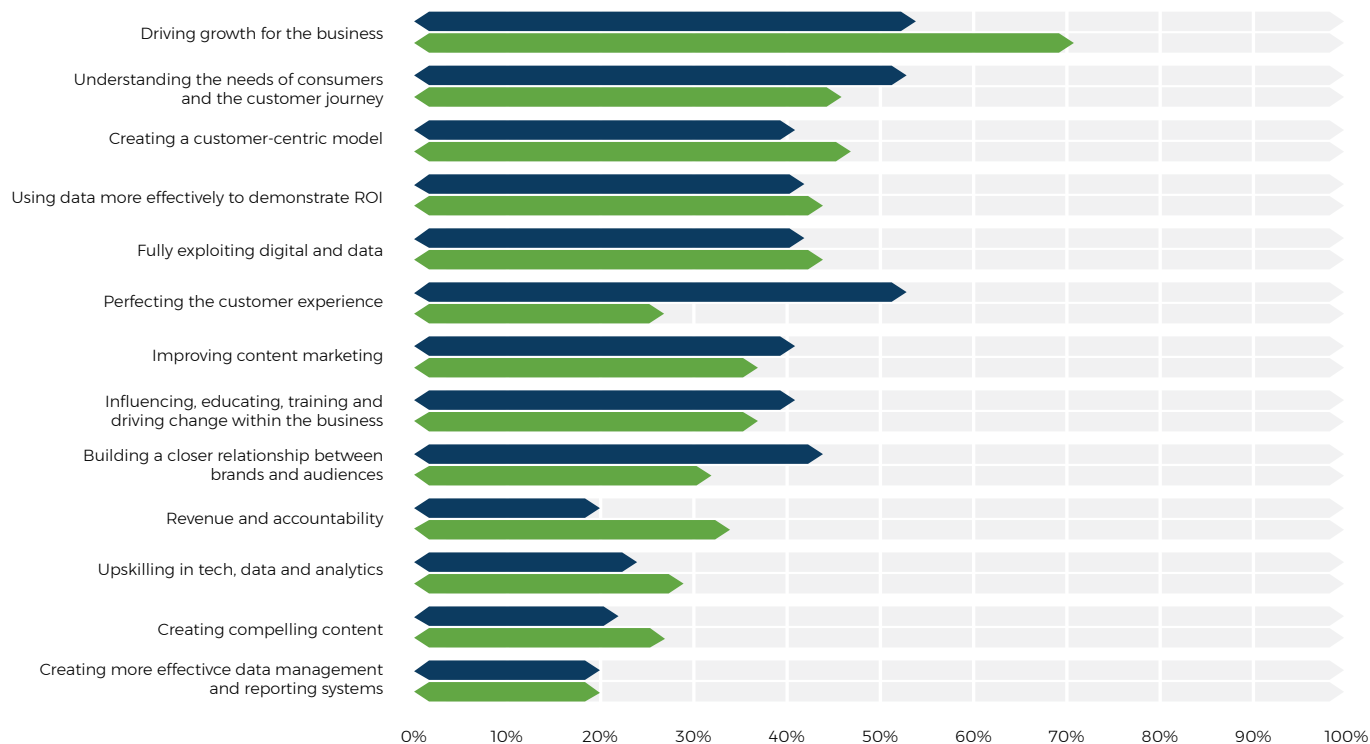
“The agenda for the Creative CMO places the customer at the centre of marketing and the business, and is more focused on brand, content and customer experience.”



Figure 6: Creative and Tech CMO areas of focus in next 12 months

■ Creative CMO

■ Tech CMO



Base: All 'creative-led' and 'analytical' CMOs

“ as the need for a digitally focused business increases, things have evolved, and the ‘solutions driven’ function of the Tech CMO has become a critical component of the sales process”

The Tech CMO Agenda

An important role of the Tech CMO is to provide their organisation with the technology, tools and data necessary to service the consumer with better and more relevant content. The Tech CMO has traditionally been the problem solver and solutions driven marketer, with creative or sales raising the questions, and the Tech CMO finding data driven solutions. But as the need for a digitally focused business increases, things have evolved, and the ‘solutions driven’ function of the Tech CMO has become a critical component of the sales process, and the facilitator of delivering the right content and brand messaging, to the right consumers as quickly as possible.

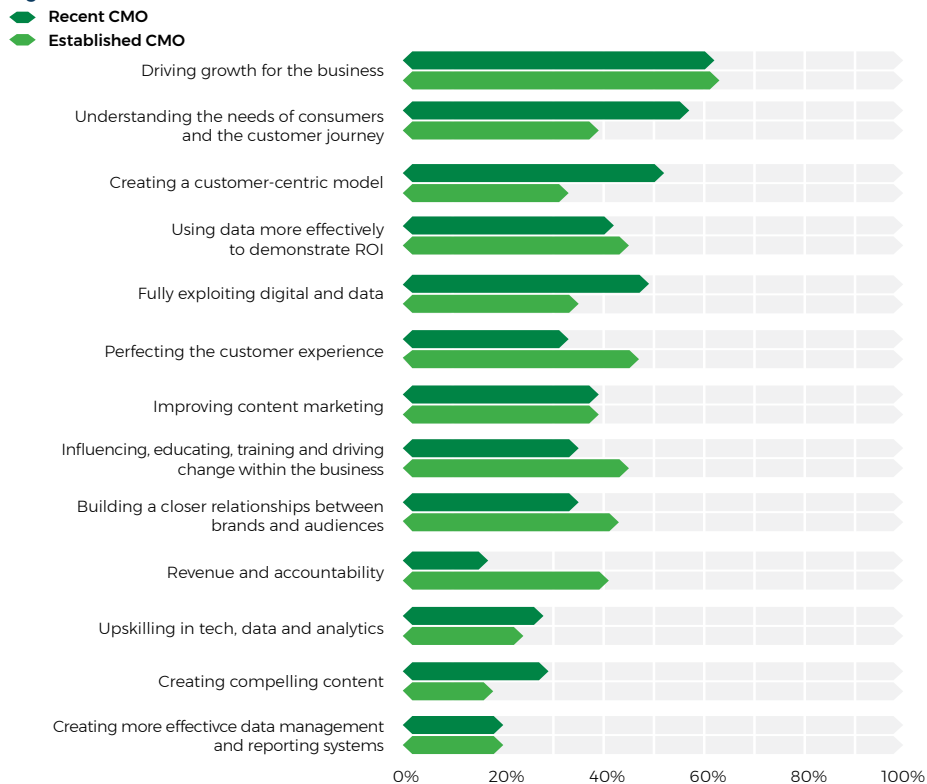
The Tech CMO is more likely to have budgetary responsibility for sales related functions than the Creative CMO, which explains why their agenda is more focused on driving growth for the business (71%) compared to their creative counterparts (54%), and +70% more likely to prioritise ‘revenue and accountability’. In addition, the Tech CMO is more focused on setting up systems, processes and models that focus on targeting the consumer. Consequently, ‘creating a customer-centric model’ and ‘upskilling in tech, data and analytics’ are significantly higher on the agenda for the Tech CMO compared to the Creative CMO.

Recent and Established CMOs

The Evolving Marketer reveals significant variations in the global CMO agenda according to length of time in current role. Established CMOs (in current role for 5 years or more) are more likely to consider themselves 'creative' rather than 'analytical'. They have already surpassed the 'development' stage within their role, with a greater focus on building collaboration within the business, aligning the brand with the consumer, and enhancing the customer experience compared to their more recent counterparts.

Recent CMOs (in their current role for less than 5 years) are more likely to consider themselves 'analytical' than 'creative'. They are at the 'set up' or 'development' stage in their role. A higher proportion of newer CMOs are eager to make a mark within their organisation, and consequently place greater focus on sorting out infrastructures, putting new systems and processes in place, and creating models that exploit the data they have access to.

Figure 7: Recent and Established CMO areas of focus in next 12 months



Base: All recent CMOs (in current role for less than 5 years), and Established CMOs (in current role for 5 years or more)

“ The longer a CMO has been in their role, the more focused on revenue they become, and Established CMOs are significantly more likely to prioritise ‘revenue and accountability’ than their more recent counterparts”

With the exception of ‘driving growth for the business’ which is the number one priority for both durations (Figure 7), the top five marketing areas of focus for Established CMOs are very different from their more recent counterparts. ‘Perfecting the customer experience’ is the second highest area of focus for the Established CMO, scoring 47%, compared to 33% for Recent CMOs. The Established CMO proactively manages networks, and promotes the exchange of best practices in business to ensure that employees within the organisation are all on the same page. This is why ‘influencing, educating, training and driving change within the business’ is the third highest area of focus among Established CMOs, scoring 45% compared to 35% for more recent CMOs. ‘Using data more effectively to demonstrate ROI’ also scores 45% for Established CMOs. The longer a CMO has been in their role, the more focused on revenue they become, and Established CMOs are significantly more likely to prioritise ‘revenue and accountability’ than their more recent counterparts (41% vs. 17%).

There is an increasing expectation for the CMO to implement change and deliver results. Recent CMOs are more confident in their ability to achieve ‘quick results’ than their established counterparts, with 84% claiming that it takes less than 5 years to ‘make a difference’ within their organisation (average 1 year 8 months), compared to only 49% of Established CMOs (average 2 years 9 months). Recent CMOs are more likely to focus their attention on ‘understanding the needs of the consumer and the customer journey’ (57%) compared to their established counterparts (39%), ‘creating a customer-centric model (52% vs. 33%) and ‘fully exploiting digital and data’ (49% vs. 35%).

**In-house vs.
Outsourced, Where
is the Balance?**

05

In-house vs. Outsource Balance

CMOs need to be fully resourced to enable them to manage their increasing workload and meet demanding expectations. Whilst 66% of global CMOs claim that their business is moving more towards in-house marketing services (rather than outsourcing), budget or other structural constraints often prevent organisations from hiring the 'perfect team' on a full-time basis. Although global CMOs would prefer to build more capable internal marketing teams and have an ambassador in-house for a range of marketing services, outsourcing can often provide the skills, talents, and technology that businesses cannot afford to bring in-house.

At present, 42% of global CMOs claim they have a 'good skill set' in place to transform quickly and effectively as a business, but only 3% claim that they have the 'perfect skill set'. Achieving the right mix of talent and tech is a key priority for global CMOs, with 68% strongly agreeing that 'It is essential to have the right people with the right skills in place to evolve with changing tech'. Having said this, 55% of global CMOs claim that they 'do not' have the right skill set, or the mix of skills could be better.

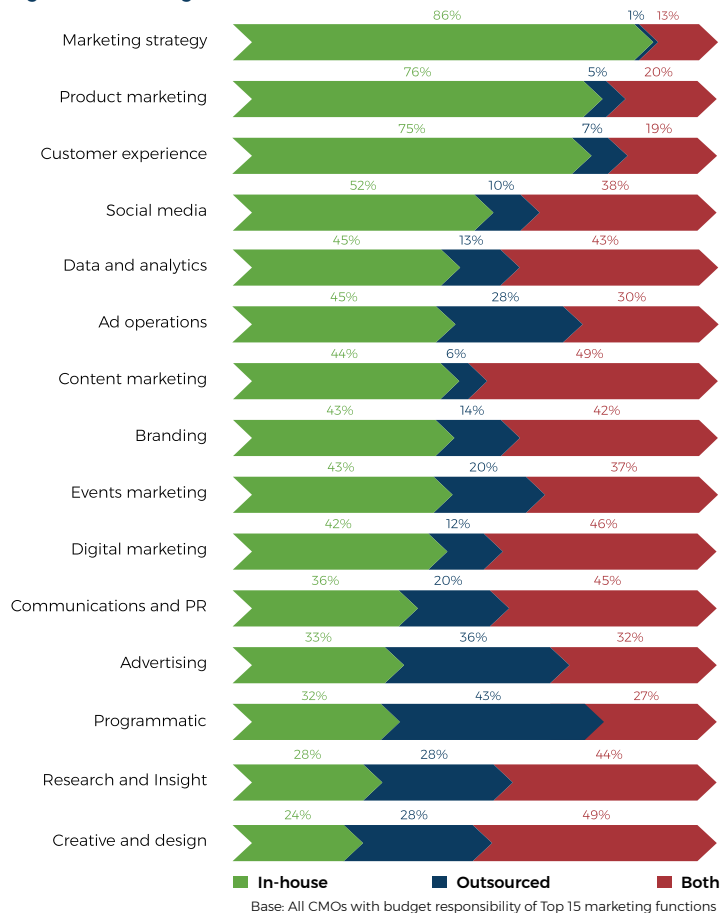
The 'perfect' in-house marketing team is of course the ideal scenario. However, due to the evolving nature of marketing, continued advancements in technology, and the increasing need to deliver 'short-term projects', outsourcing vendors can often be an attractive and cost-effective way to access an immediate specialist skill or asset as and when required.



“ There are some critical functions that need to remain in-house and these tend to relate to strategy, pricing, product and customers.”

So which marketing services are delivered in-house, and which are placed in the hands of marketing vendors? The Evolving Marketer shows that current mix of in-house vs. outsource varies depending on the marketing service (Figure 8). Despite the issues surrounding programmatic and concerns regarding the level of control over where ads are being placed, programmatic still represents the highest ‘fully outsourced’ service among global CMOs (43%), followed by advertising (36%), creative and design, and research and insight (both 28%). But not everything can be outsourced. There are some critical functions that need to remain in-house and require the day to day control and management of the marketing team, and these tend to relate to strategy, pricing, product and customers. Among the top 15 areas where CMOs have budget responsibility, marketing strategy is the number one function delivered entirely in-house (86%), followed by product marketing (76%), customer experience (75%) and social media (52%).

Figure 8: Marketing functions in-house and outsourced



A mix of in-house and outsourcing for some marketing functions can be an attractive option. Tapping into external resources to support the marketing team often relates to a specific project, where the CMO would assign a team member to manage vendors and guide assignments. Marketing services most likely to involve a combination of both in-house and outsourcing include content marketing (50%), creative and design (49%) digital marketing (46%) and communications and PR (45%).

Skillset Balance

Many automated systems, processes and efficiencies are now in place to handle repetitive tasks, which to some extent has freed up time for marketing teams to focus more on consumer and creative related work. But with the growing range of services provided by the marketing department, and the increased revenue and accountability demands being placed on the CMO, it is increasingly important to have diverse teams with the right creative/tech balance in order to service both the business, and the consumer effectively and efficiently. However, 60% of global CMOs currently feel that they 'do not have the right balance between creative and analytics'. No CMO possess all the necessary skills required to maximize business success, and as marketing becomes a broader discipline, the CMO needs to find people with a range of both creative and analytical abilities to fulfil the evolving range of marketing services required to meet the demands of the business. Whilst there are marked differences between the marketing agendas of the Creative and the Tech CMO, both are ultimately working towards the common goal of 'driving growth for the business.'

“60% of global CMOs currently feel that they 'do not have the right balance between creative and analytics'.”

“Whilst there are marked differences between the marketing agendas of the Creative and the Tech CMO, both are ultimately working towards the common goal of 'driving growth for the business'.”

Over three quarters (77%) of global CMOs agree that 'there is increasing interest in marrying art, science and data'. So the key is to work towards a seamless balance of creativity, idea generation, science and data. This often means looking outside the usual talent pools to source the right team members, and as a starting point, a Tech CMO could benefit from a strong creative number two, or a Creative CMO may welcome an analytical second in command.

Achieving the right balance between creative and tech expertise is the first step, and once in place, there needs to be collaboration across the entire marketing team to ensure all the moving parts are working towards a common goal.

At present, there is room for improvement, with 92% of global CMOs agreeing that 'creative and analytics need to work more closely together to drive business success.' (61% strongly agree). So the CMO not only needs to establish a balance of functions, but also encourage creative minds and intelligence to work in harmony to drive business success. The CMO needs to lead and inspire a diverse range of skills, and achieving synergy within the marketing team is a key priority.



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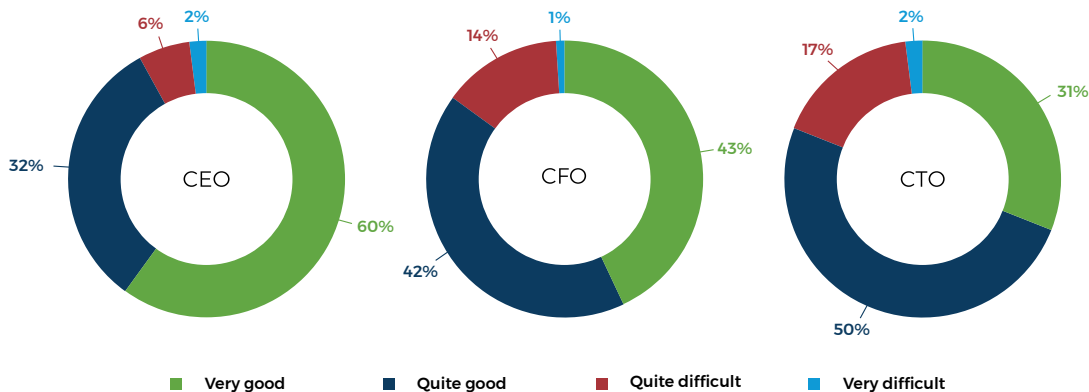
Relationships and Understanding

CMO Relationships and Collaboration

In such a dynamic marketing environment, it is more important than ever for the global CMO to build a strong relationship with their C-suite counterparts and have a clear understanding of the CEO's and CFO's business goals and growth plans. Ultimately the CMO is the transparent and trusted adviser to the CEO in all brand and customer related matters. The CMO is responsible for sharing data driven success and potential growth opportunities for the business to the board, as well as communicating what is not working, and what needs to be fixed. Importantly, a strong relationship

with the CMO gets the CEO closer to the consumer, and working with the CEO helps the marketing department to become directly involved in driving the business. The increasing importance of marketing's contribution to revenue generation has helped build a stronger bond between the CEO and CMO, with 60% of global CMOs claiming to have a 'very good' relationship with their CEO (Figure 9). Furthermore, over half of global CMOs (53%) claim that their CEO has a 'full understanding of the value of marketing and the role of the CMO' (Figure 10).

Figure 9: CMO relationship with C-Suite executives

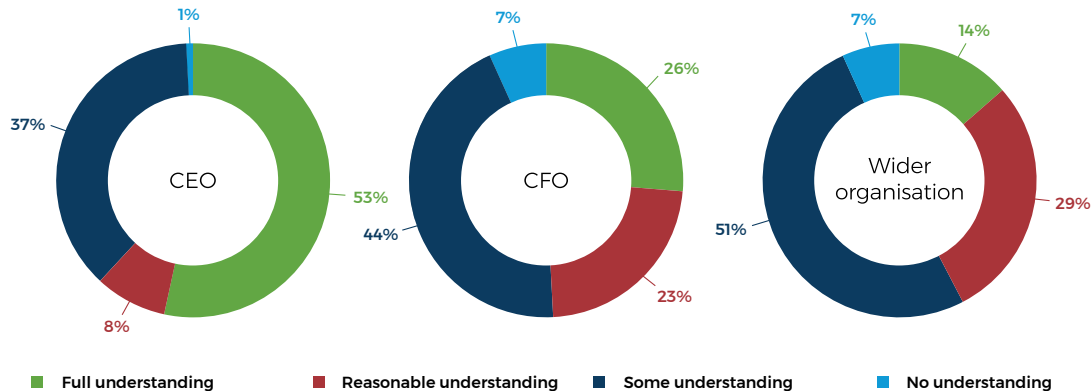


Base: All global CMOs



Despite the positive connection between the CMO and CEO, the CMO's relationship with the CFO is not quite as strong, with just over four in ten of global CMOs claiming to have a 'very good' relationship with their CFO. Furthermore, a high percentage of global CMOs (63%) struggle to convince the CFO that 'investment, and change is essential to grow the business'. Requests for further funding to enhance the business can add strain on the relationship between the CMO and CFO, and this is further fuelled by the fact that only 26% of global CMOs feel that the CFO has a 'full understanding of the value of marketing and the role of the CMO', and over half agree that 'CFOs do not understand the full value marketing brings to the business'.

Figure 10: Understanding of the role of marketing and the CMO



Base: All global CMOs

This perceived gap in knowledge lies with digital, where 75% feel that 'CFOs need a greater understanding of digital'. But overall, there is a clear need for CMOs to focus on building a stronger relationship with the CFO and educate them on the dynamic marketing ecosystem, changing consumer needs, and the revenue contribution that marketing brings to the business.

Importantly, the CMO needs to work hand in hand with the CTO. But as the CMO becomes increasingly involved in more areas of data and technology, and tech budget continue to shift to marketing, the boundaries between the CMO and CTO are blurring, and there is growing confusion in terms of who owns what. Where previously, the CTO would be the controller of the technology stack and the leader of data and analytics, the CMO is becoming increasingly responsible for making technology decisions and investments, and this often creates tension between the CMO and CTO, and their respective departments. This could explain why only 31% of CMOs claim to have a 'very good' relationship with their CTO (Figure 10) and again, points to the need for CMOs to work more closely with IT, tap into their knowledge of tools, systems and tech advancements, and clearly define the technological boundaries between marketing and IT.

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The Empowered CMO

07

/// The Empowered CMO

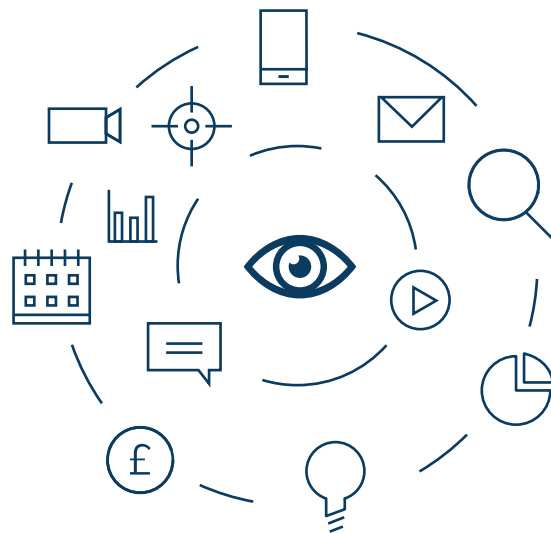
In order to make a bigger difference within their organisation, the global CMO feels that the full potential of marketing and the CMO has yet to be unlocked. The Evolving Marketer reveals that 40% of global CMOs claim to have total control of their budgets, and less than a third (32%) have full autonomy over business strategy. The global CMO feels squeezed, with 71% agreeing that 'marketing requires greater autonomy in order to deliver its strategic goals effectively'.

By inspiring the CMO and providing greater autonomy over their full marketing remit, this not only encourages proactivity and entrepreneurship, but also helps build relationships internally, which in turn, can benefit the business. Those with full autonomy in their roles (Empowered CMO) have budget responsibility of 14 marketing functions on average, compared to only 10 among those lacking autonomy. The Empowered CMO is also more up-beat and progressive, with 45% stating that the influence of marketing on their organisation has 'increased significantly' in the last few years, compared to only 24% among those with no autonomy.

In addition, 72% of Empowered CMOs claim to have a 'very good' relationship with the CEO, compared to 46% among those with no autonomy, and half claim to have a 'very good' relationship with the CFO compared to only 37% of those with no autonomy. There is also greater collaboration and understanding of roles between the Empowered CMO and

their C-Suite counterparts. Two thirds of Empowered CMOs feel that their CEO has a 'full understanding' of the value of marketing and the role of the CMO compared to only 39% among CMOs with no control. This suggests that by empowering the CMO with more autonomy, this could strengthen C-level relations, and enhance trust and understanding between the C-Suite, and their respective departments.

71% OF CMOs SAY THEY NEED FULL AUTONOMY IN ORDER TO DELIVER ON THEIR STRATEGY



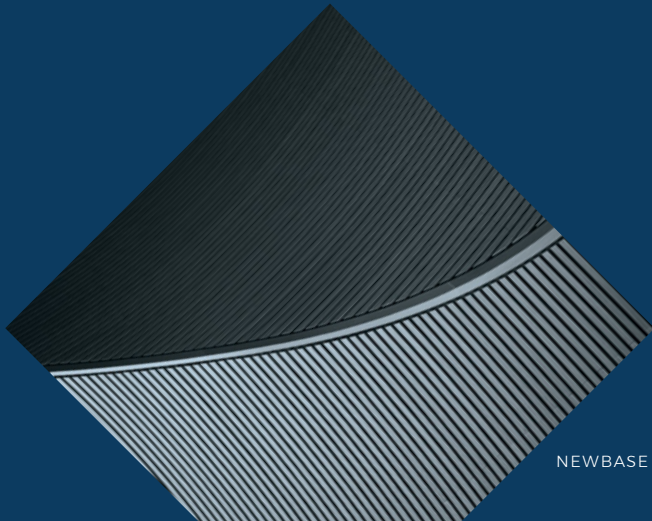
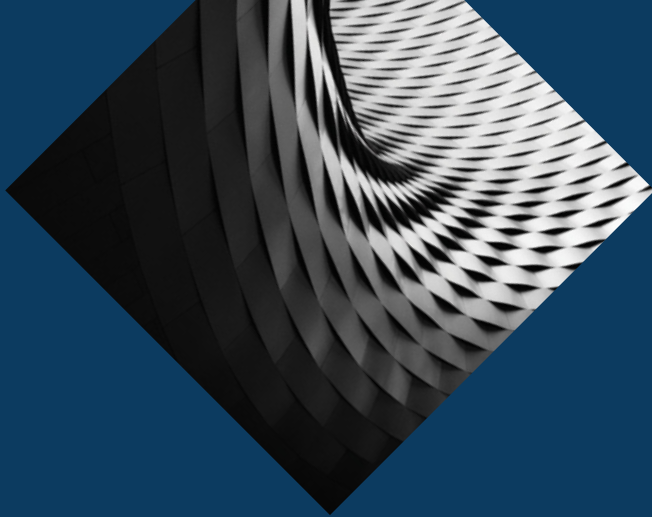
Key Take-outs

08

Key Take-outs

1. The CMO and marketing team represent the lift-shift of the business. Positioned at the heart of the organisation, they connect the brand with the consumer at ground level, exchanging information with multiple functions and departments at all levels of the business.
2. The consumer is constantly changing, and demanding more relevant content, in the right format and at the right time. The CMO is increasingly placing the customer at the heart of the business, using data to understand their needs, and innovating accordingly. Delivering relevant, and engaging experiences throughout the customer journey is a key area of focus for the global CMO in 2018.
3. The role of the CMO is complex. Budget and the amount of time devoted to most marketing functions is on the increase. Consequently, staying ahead of evolving technology and the changing needs of the consumer is essential.
4. Data and analytics registers the highest percentage of budget increase. However, The Evolving Marketer reveals that less than 50% of data is being fully exploited. So, CMOs need to devote more attention to the tools and resources required for smarter analysis, interpretation and implementation of data in 2018, rather than acquiring more and more data, or focusing on the latest tech.





5. The global CMO has an increasing level of influence within their organisation. As technologies grow and their remit expands, the CMO needs the right team and skillsets in place to satisfy the increasing, and varied needs of both the business, and consumers. A mix of creative and tech expertise in the marketing team is a key consideration to provide the right balance of relevant data delivery, and creative interpretation.
6. The global CMO needs to be aware of the marketing functions where current areas of involvement are low, but time investment and budget levels are growing e.g. customer experience, data and analytics, programmatic and Ecommerce. These are the marketing areas where the remit of the CMO is likely to expand in the future.
7. In today's dynamic marketing ecosystem, CMOs should not be afraid to outsource niche resources and areas of specific expertise or assets when required, as a fully serviced in-house team is not always feasible.
8. The global CMO plays an increasingly active part in revenue generation and 'driving growth for the business' is top of the global CMO agenda. This contribution to the bottom line is not always recognised by their business. Consequently, the CMO and the marketing team needs to educate their organisation (at all levels) on the benefits and commercial value of the CMO and the function of the marketing team.

9. There is a relatively healthy relationship between the CMO and CEO. But there is a knowledge gap in the CFO's understanding of marketing which can have a negative impact on business progression. So, there is a clear need for CMOs to build a stronger relationship with the CFO and educate them on the dynamic marketing ecosystem, changing consumer needs, and the revenue contribution that marketing brings to the business.
10. As technology, data and analytics are increasing areas of budget responsibility for the global CMO, the boundaries between the CMO and CTO are blurring. The CMO needs to work closely with the CTO to clearly define the goals and functions of marketing and the IT department.
11. The successful CMO has the ability to affect change within their organization and influence their C-Suite peers. The Evolving Marketer shows that by empowering the CMO with more autonomy over budgets, operational and strategic decisions, this can strengthen relations at board level, and have a positive impact on the business.



Survey Approach

The Evolving Marketer is an online global survey among 120 CMOs in over 20 markets exploring the role of the CMO, and the changing marketing landscape. The survey was undertaken by Synergy Research and Consulting and fielded between November 2017 and January 2018. All respondents are senior brand marketers with budgetary responsibility working across a range of sectors with 40% in finance, technology or retail. 53% of respondents are female with the average age 46. A quarter work in b2b organisations, 35% b2c, and 40% work for businesses covering both. 57% of all respondents work for larger organisations (250+ employees) and 43% for SMEs (under 250 employees) and on average, they have been in their current role for just over 5 years. In this report the CMO term generically refers to a company's top marketing leader.





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