

# CMO Quarterly

Third Quarter 2025

## Use **Customer Understanding** as Your **North Star** Amid Disruption



Gartner®





# Letter From the Editor

In today's rapidly evolving market, customer understanding serves as a vital North Star, guiding chief marketing officers (CMOs) to align strategies with their customers' true needs. This alignment is crucial for developing trust and loyalty, as well as supporting sustainable growth and innovation.

Unlike traditional marketing performance metrics such as conversion rates or return on ad spend, a deep understanding of customers provides a comprehensive view of your target audience's needs, values, challenges and journey. This journal examines how these insights empower CMOs to navigate ambiguity with empathy and craft strategies that anticipate customer needs while adapting to changing market dynamics.

Our renowned research, "Insights From the 2025 Gartner CMO Spend Survey," highlights how CMOs are navigating budgeting decisions in a complex and challenging environment. Amid volatility and budget constraints, marketing budgets have leveled off at 7.7% of company revenue.

This research underscores the strategic priority of investing in customer understanding. It also provides marketing budget benchmarks, highlighting significant variances between budget-conscious CMOs and big spenders, including their priorities related to personalization and insights.

In "Digital IQ: Strategies That Distinguish Genius Digital Marketing Brands," our research reveals the fundamental qualities propelling "Genius" brands to the forefront — especially deepened customer insight. Genius brands prioritize innovation, adaptive strategic planning and developing teams and processes that identify and address unmet customer needs.

Want to move beyond campaign performance and drive enterprise growth strategy? "CMOs, Reassert Marketing's Role in Growth Strategy" examines the essential capabilities for CMOs looking to reinforce their role in shaping the market and exceeding C-suite expectations. Specifically, CMOs can take a larger role in shaping enterprise growth strategies by providing meaningful insights into customer behavior and market trends.



“How Your Messaging Drives B2B Buyer Decision Making” focuses on B2B marketing, underscoring the necessity of understanding not only individual buyers but buying groups. Successful B2B marketing teams optimize messaging and content for “collective resonance.” Messaging and content with collective relevance offers buyers a clear understanding of other perspectives in the buying group and communicates how your offerings benefit the buyer’s organization. This approach, in turn, drives buying group consensus, which is crucial for completing high-quality purchases.

“Key Stats: The Customer Understanding Gap Limits Personalization” showcases Gartner’s quantitative insights about the disconnect between B2C CMOs’ perceived understanding of customers and the customer-perceived reality, as a majority of consumers feel misunderstood by brands. This gap leads to negative customer perceptions of personalized communications — with many customers

finding them irrelevant or even unsettling — and a growing number of consumers reluctant to share data for personalization. As CMOs plan to make significant investments in personalization, they must prioritize using data that customers are comfortable sharing, such as purchase history, to bridge this “gets me” gap and build trust.

Finally, are your marketing efforts struggling to build lasting customer connections? In “3 Steps to Drive Loyalty With a Customer-First, Channel-Second Strategy” learn why prioritizing channel selection and execution over understanding your audience often leads to poor results. Our research guides you through a three-step process for aligning channel selection to an assessment of customer impact and internal capabilities. This approach ensures customer expectations are met, fostering stronger relationships and driving growth.

Anna Maria Virzi

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# Insights From the 2025 Gartner CMO Spend Survey

by Ewan McIntyre, Rachel Smith, Alex De Fursac Gash, Shaurya Singh, Karen Carter

Following several years of consistent decline, marketing budgets have leveled off. Facing ongoing fiscal challenges, CMOs are placing their bets on paid media channels and leaning into productivity tactics to navigate 2025's choppy waters.





Since its inception in 2012, Gartner’s annual CMO Spend Survey has chronicled the evolution of marketing budgets and strategies. The period between 2012 and 2020 was marked by relative optimism for marketing, with budgets exceeding 10% of company revenue. During this time, CMOs were buoyed by the promise of digital transformation, the rise of social media and the burgeoning potential of digital commerce.

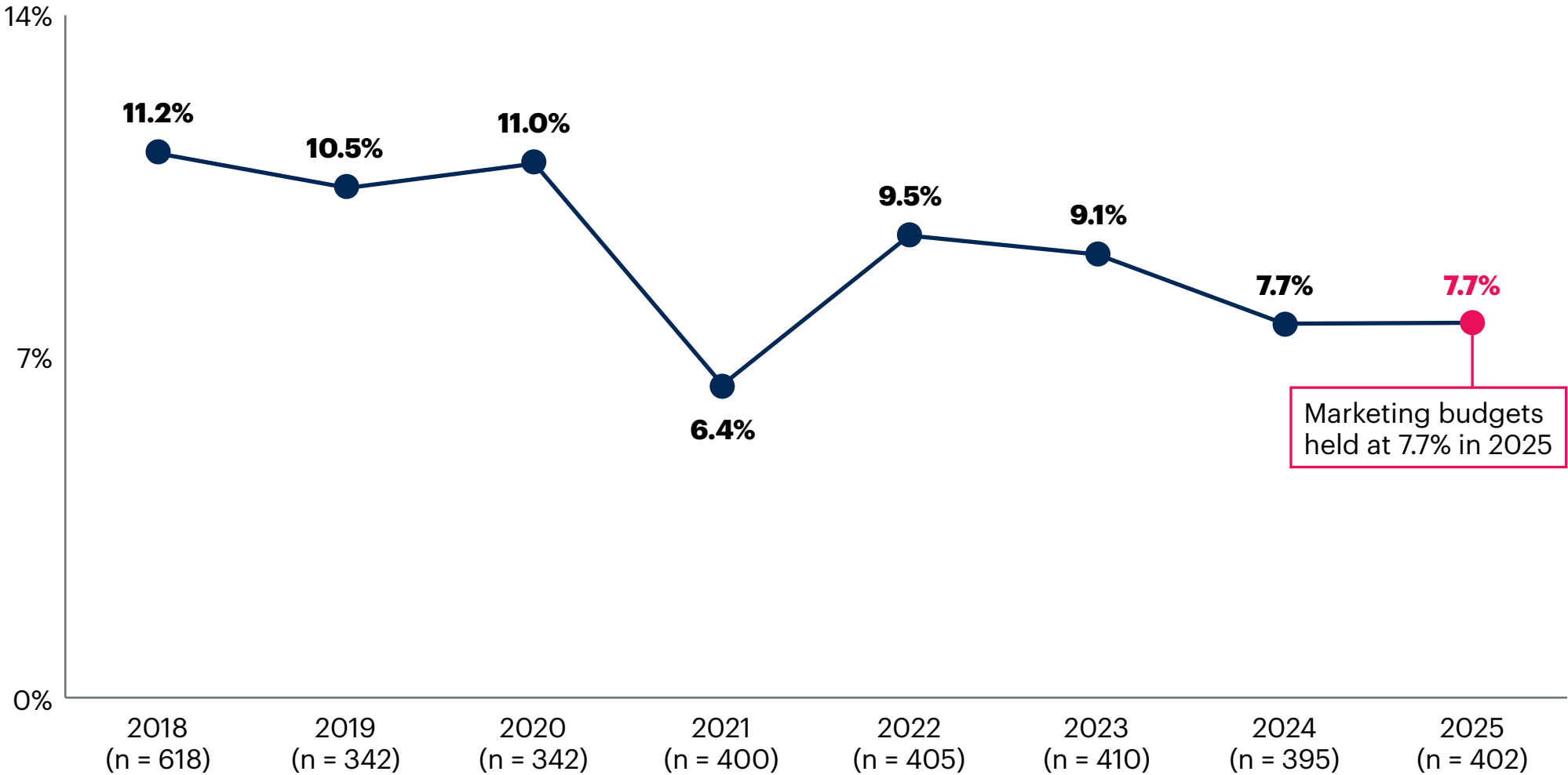
However, the landscape has shifted significantly. In 2025, CMOs face a more complex and challenging environment characterized by economic disruptions and budget constraints. This year’s survey captures the financial realities of CMOs at a pivotal time of opportunities and challenges.

### Marketing Budgets Level Off in 2025

Marketing budgets have stabilized at 7.7% of company revenue, reflecting a period of zero growth (see Figure 1).<sup>1</sup> This stabilization comes amid significant volatility, marked by a succession of changes in U.S. federal policy and broader macroeconomic turbulence.

» **Figure 1: Average Marketing Budget as a Percent of Total Revenue**

Mean percentage of company revenue shown



n = 342-618 CMOs, bases vary by year

Q. What percentage of your revenue is being allocated to your total marketing expense budget?

Source: Annual Gartner CMO Spend Survey (2018-2025)



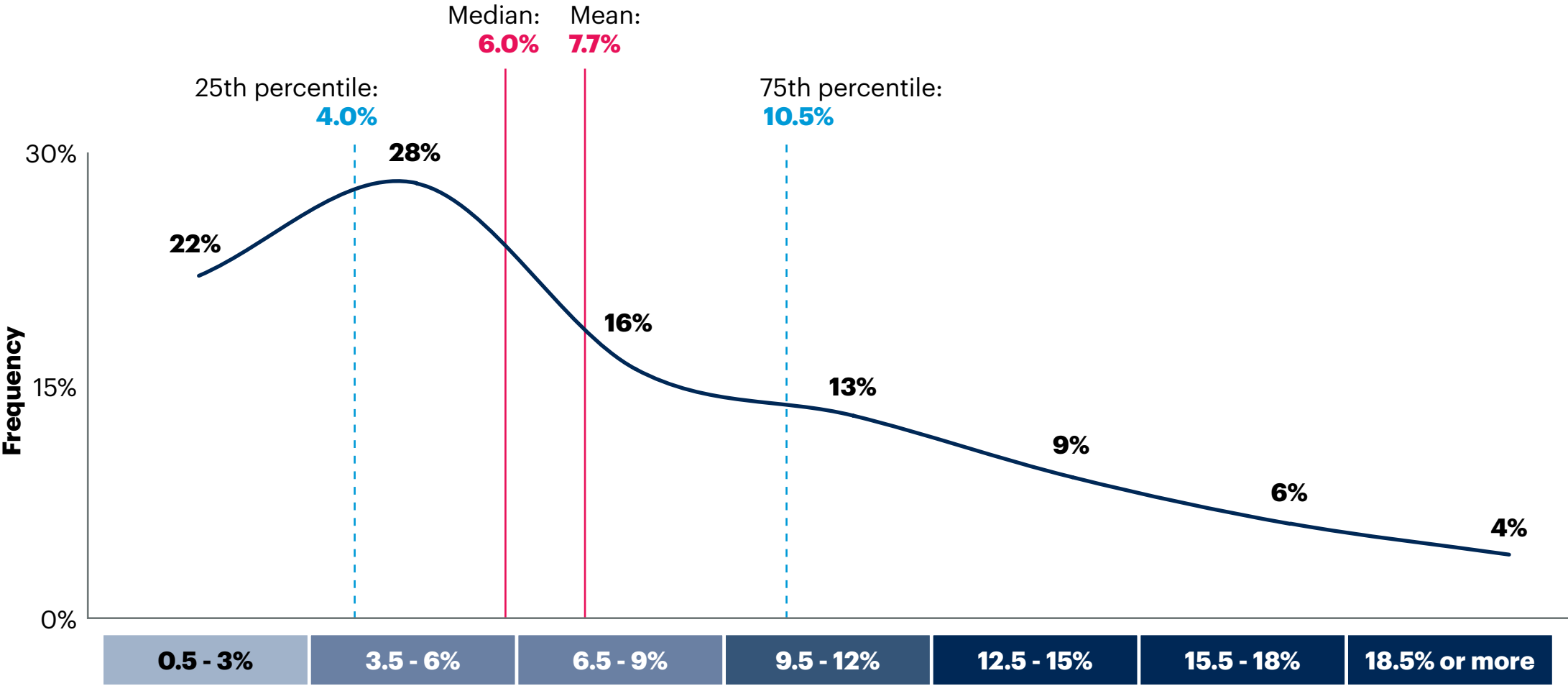
While this trend halts the postpandemic budget decline, it poses challenges for CMOs who find this level of funding insufficient to meet their strategic needs. As budgets stagnate, marketing’s “era of less” continues; meanwhile, lingering volatility casts doubt on marketing spending in 2025, increasing the likelihood of in-year budget cuts.

CMOs Face Significant Differences in Budgets

The average budget is an important number: It helps sum up the general mood of marketing spending and strategy in 2025. But the average CMO budget of 7.7% masks significant variances among CMOs (see Figure 2). The lowest quartile of respondents to this year’s survey have budgets way below the mean average: 4% or less of company revenue goes to marketing spending.

» Figure 2: Marketing Budget as a Percent of Total Revenue (2025)

Quartile analysis means shown



n = 402 CMOs  
Q. What percentage of your revenue is being allocated to your total marketing expense budget in 2025?  
Source: 2025 Gartner CMO Spend Survey  
Note: Percentage totals may not add to 100% due to rounding.



These budget-conscious CMOs prioritize operational spending over transformation, limiting their channel choices and investment in data and analytics.<sup>1</sup> They allocate a substantial portion of their budget to digital channels, particularly performance-driven ones such as search advertising, which offer a reliable return on investment. However, this focus on immediate returns often comes at the expense of long-term strategic initiatives, such as personalization and insights, which are crucial for deepening customer understanding and enhancing campaign effectiveness.

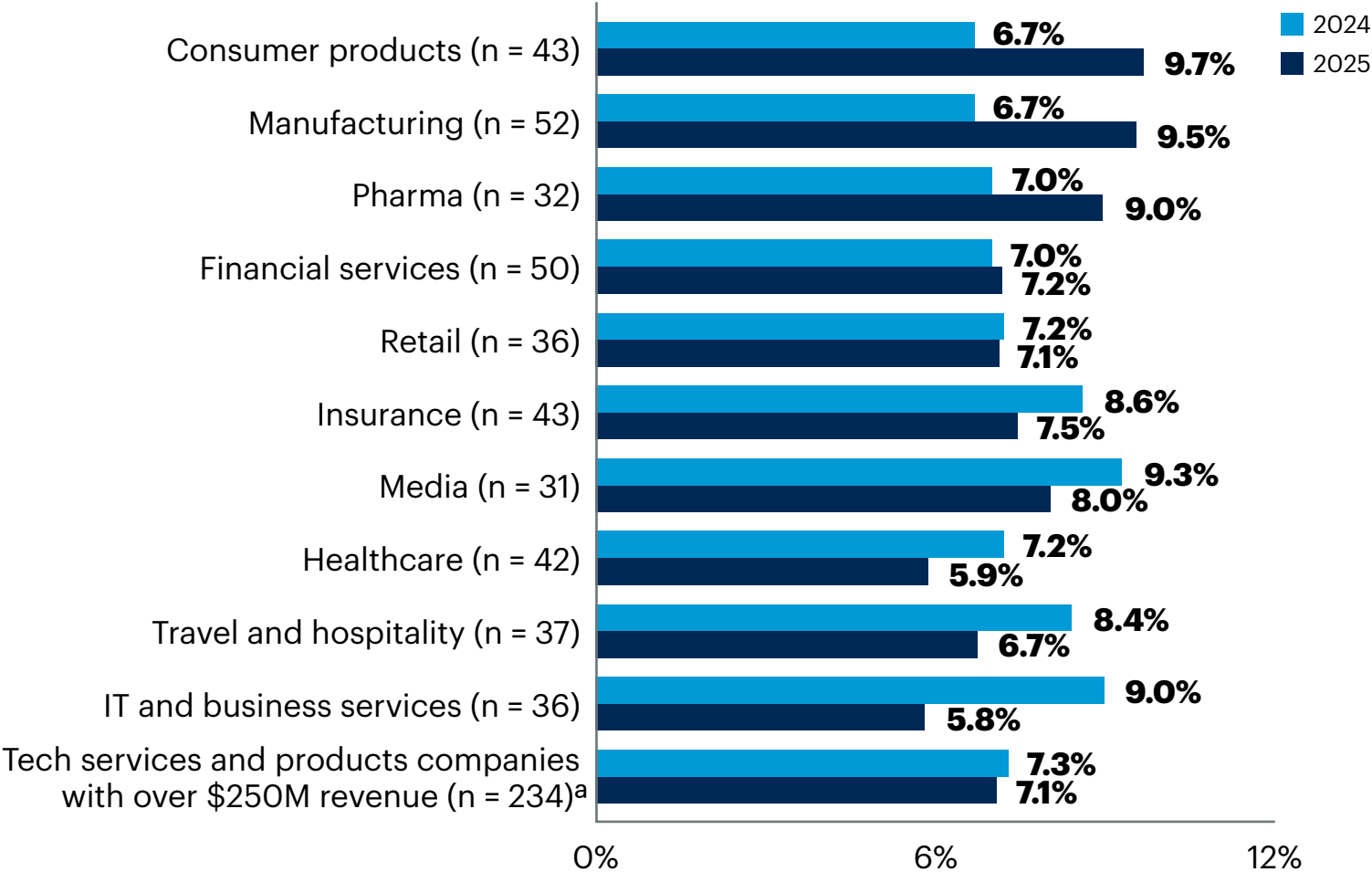
In contrast, the highest quartile of respondents are big spenders with budgets of 10.5% or more. This affords them the flexibility to allocate funds across a diverse range of channels and allows them to invest heavily in

transformation and personalization.<sup>1</sup> These CMOs have the budget headroom to sustain investment in current marketing success while earmarking funds for future growth. Their broader budgetary scope allows them to build a balanced portfolio, addressing multiple touchpoints in customer journeys and investing in strategically important programs that drive campaign effectiveness.

### Some Industries See Budget Growth Surge

Significant industry variances exist. Consumer products, manufacturing and pharma experienced sizable year-over-year budget growth, while respondents from healthcare, travel and hospitality, and IT and business services report challenging budget declines (see Figure 3).

» **Figure 3: Marketing Budget as a Percent of Total Revenue: YoY**  
Mean percentage of company revenue shown



n = n varies, by industry and year. Chart base size shows the 2025 respondents for each industry.  
Q. What percentage of your revenue is being allocated to your total marketing expense budget in 2025?  
Source: Annual Gartner CMO Spend Survey (2024-2025)  
<sup>a</sup> Source: Annual Gartner Tech Marketers Survey (2024-2025)



The highest gains, however, may be short-lived due to external pressures such as inflation and geopolitical tensions:

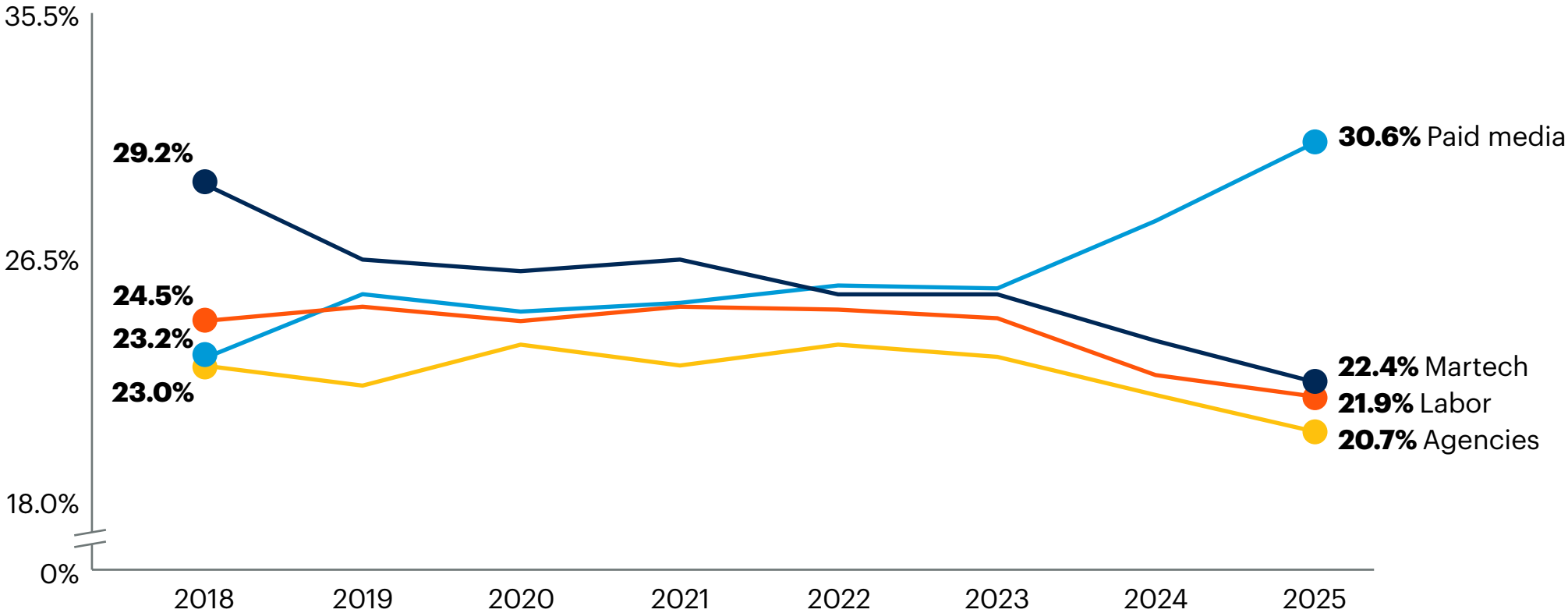
- Consumer products CMOs, who reported a 45% increase in budgets to 9.7% of company revenue, are susceptible to inflationary pressures and volatile consumer spending patterns.<sup>1</sup>
- Manufacturing CMOs saw a jump from 6.7% to 9.5%, but tariff-related challenges and supply chain adjustments continue to create an uncertain cost environment.<sup>1</sup>
- Pharma, traditionally a high-spending industry, experienced a 29% lift to 9% of company revenue,<sup>1</sup> although geopolitical uncertainties continue to impact strategic decisions.

CMOs in these industries must remain agile and responsive to changing conditions, calibrating their scenario plans and strategic responses to external factors.

### CMOs Prioritize Paid Media Investments

CMOs are allocating a significant portion of their budgets — 30.6% — to paid media, up from 27.9% in 2024<sup>1</sup> (see Figure 4).

» **Figure 4: Historical View Marketing Budget Allocation Across Major Resources (2018-2025)**  
Mean percentage of marketing budget shown



n = 401 CMOs (2025), bases vary by year.  
Q. How is your total marketing expense budget being allocated to or spent on each of the following major resource categories?  
Source: Annual Gartner CMO Spend Survey (2018-2025)



Despite increased spend, media inflation and channel complexity pose challenges to achieving desired returns. Digital channels dominate the media mix, with paid search, social advertising and digital display leading the way. Meanwhile, events and linear TV maintain their dominant positions in offline channels.

Protecting media budgets in times of heightened volatility is crucial, as buying cycles extend and brands strive to maintain relevance and share of voice. However, customer journeys and channel preferences change quickly while media price inflation erodes return on ad spend and eats into spending power. Marketing channel choices have become a strategic consideration; CMOs must carefully calibrate allocations across an increasingly dynamic media mix.

CMOs seek to balance the long-term goals of brand awareness and sustained loyalty with nearer-term consideration and conversion activities. Despite constrained budgets, more than half of CMOs' media budgets are allocated to consideration and conversion activities, with allocations for the very bottom of the funnel increasing year over year.<sup>1</sup> While brand awareness remains important — 29% of media spend is focused on this stage<sup>1</sup> — CMOs are increasingly prioritizing performance channels, driven by the need for immediate results.

## CMOs Embrace Advanced Budget Techniques

In response to budget constraints, CMOs are focusing on productivity. This year's Gartner CMO Spend Survey highlights a shift toward advanced budgeting techniques like zero-based budgeting and a focus on efficiency through technology, data and process improvements. The enterprise increasingly views marketing as a profit center (rather than a cost center), and 94% of CMOs report they are meeting or exceeding ROI goals.<sup>1</sup> This shift toward productivity is evident in the use of measurement, automation and AI-driven efficiency as key drivers. Prioritization, collaboration and process improvements are also essential, illustrating that success lies at the intersection of human and technology-enabled capabilities.

Meanwhile, techniques such as zero-based budgeting build fiscal competence and accountability, embedding productivity measures into marketing planning. By ensuring that major marketing investments are tied to realistic cost assessments and demonstrable contributions to business goals, CMOs are better equipped to defend marketing budgets in times of volatility.





# Conclusion: CMOs Navigate Volatile Budget Landscape

The 2025 Gartner CMO Spend Survey underscores the need for CMOs to adapt to a volatile environment by prioritizing productivity and strategic investments. As marketing budgets remain flat, CMOs must balance short-term performance goals with long-term brand building, using digital channels and data-driven insights to navigate the challenges ahead. By focusing on productivity plays and strategic planning, CMOs can optimize their resources and drive marketing success in an increasingly complex landscape.

## Recommendations

CMOs should:

- Continue to invest in digital channels, particularly those offering high targetability and adaptability.
- Adopt advanced budgeting techniques to enhance fiscal competence and accountability.
- Focus on productivity plays, using technology and process improvements to maximize ROI.
- Account for external factors in strategic planning, ensuring agility and responsiveness to changing market conditions.

<sup>1</sup> **2025 Gartner CMO Spend Survey.** This survey explored top-line marketing budgets with the goal of understanding how changing customer journeys, pressures from the C-suite and cost challenges affect marketing’s spending priorities and channel effectiveness. Conducted online from January through March 2025, the research included 402 respondents from North America (n = 202), the United Kingdom (n = 97) and Europe (n = 103; including France, Germany, Belgium, Denmark, Finland, Netherlands, Norway and Sweden). Participants were required to be involved in decisions related to setting or influencing marketing strategies/planning, aligning marketing budgets/resources, or leading cross-functional programs and strategies with marketing. Seventy-seven percent of the respondents represented organizations with annual revenue of \$1 billion or more. The respondents came from a diverse range of industries: manufacturing (n = 52), financial services (n = 50), insurance (n = 43), consumer products (n = 43), healthcare (n = 42), travel and hospitality (n = 37), IT and business services (n = 36), retail (n = 36), pharma (n = 32), and media (n = 31). Disclaimer: Results of this survey do not represent global findings or the market as a whole, but reflect the sentiments of the respondents and companies surveyed.





# The Gartner Marketing Budget and Efficiency Benchmark

Optimize your marketing investments and drive long-term improvements with the Gartner Marketing Budget and Efficiency Benchmark.

Key benchmarking areas include:

- Budget and spend
- Headcount and staffing
- Expenditures

→ **Get Started**



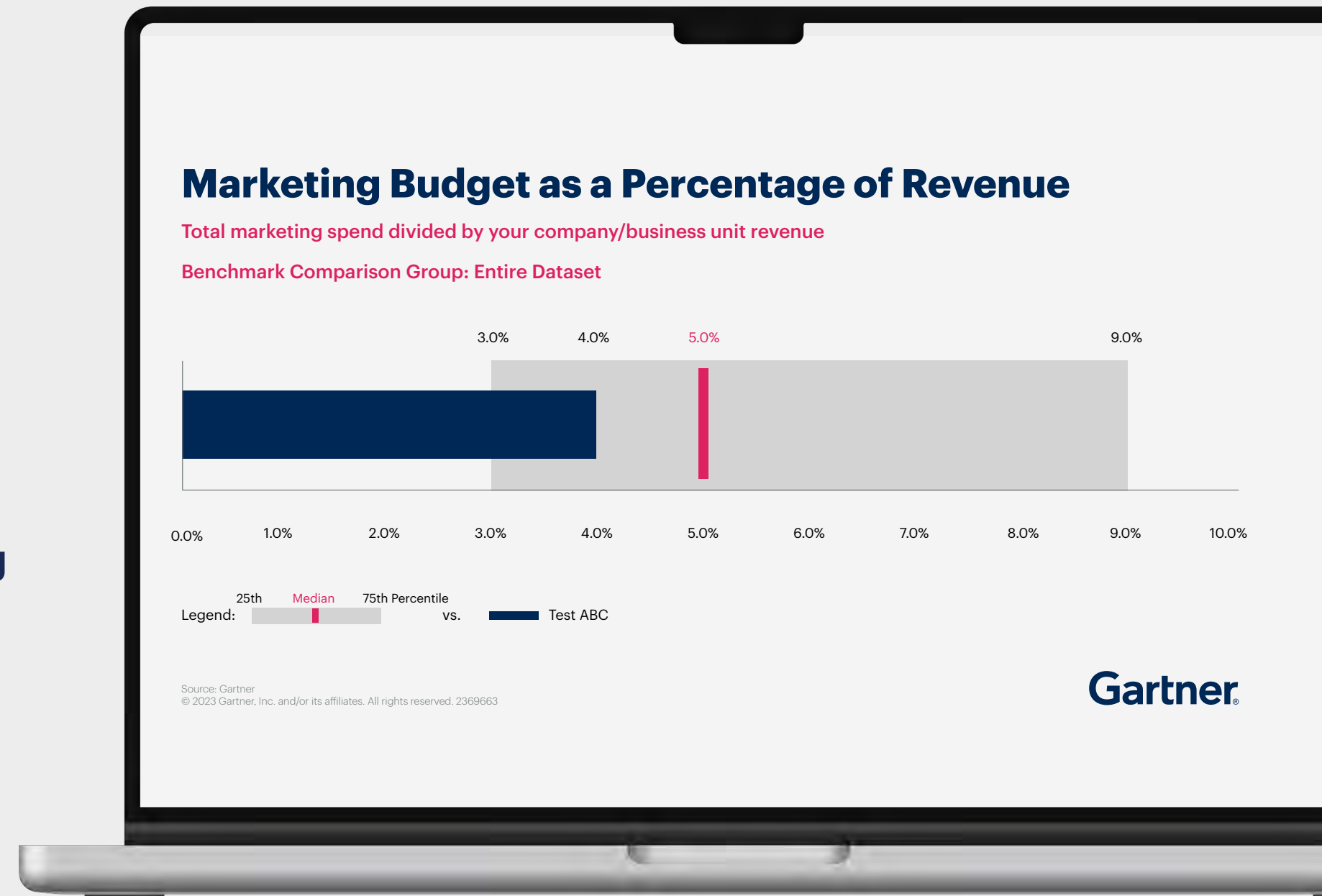
Build business cases



Defend budgets



Make data-backed decisions





# Digital IQ: Strategies That Distinguish Genius Digital Marketing Brands

by Leah Leachman, Matt Moorut, Sharon Cantor Ceurvorst

Constant evolution in the digital marketing landscape makes best-in-class strategy challenging for CMOs to achieve. Learn how “Genius” brands foster innovation via long-term strategy, deepen customer understanding with tech and talent, and deliver relevant touchpoints by enabling high-performance execution.





Gartner’s Digital IQ Index reports benchmark brands’ digital performance against peers within given industries such as retail banking or pharma. In 2024, Gartner Digital IQ reports studied 1,239 brands from 12 industries. For each report, data is collected across four key digital marketing dimensions: website, digital marketing channels, social media and path to purchase.

Brands are compared to their peers to quantify their relative digital marketing aptitude and are assigned to one of five distinct classes: Genius, Gifted, Average, Novice or Beginner. Only 36 brands earned the rank of Genius across all 2024 reports. A higher share of brands maintained their Genius rankings in 2024 than ever before amid volatility on online channels such as Google and TikTok as well as evolving business contexts. This trend suggests the fundamentals that Genius

brands excel at are increasingly separating leaders from the pack. As the gap between leaders and all other index brands deepens, CMOs must be bold and proactive in developing foundational best practices in digital marketing to ensure their brands aren’t left behind.

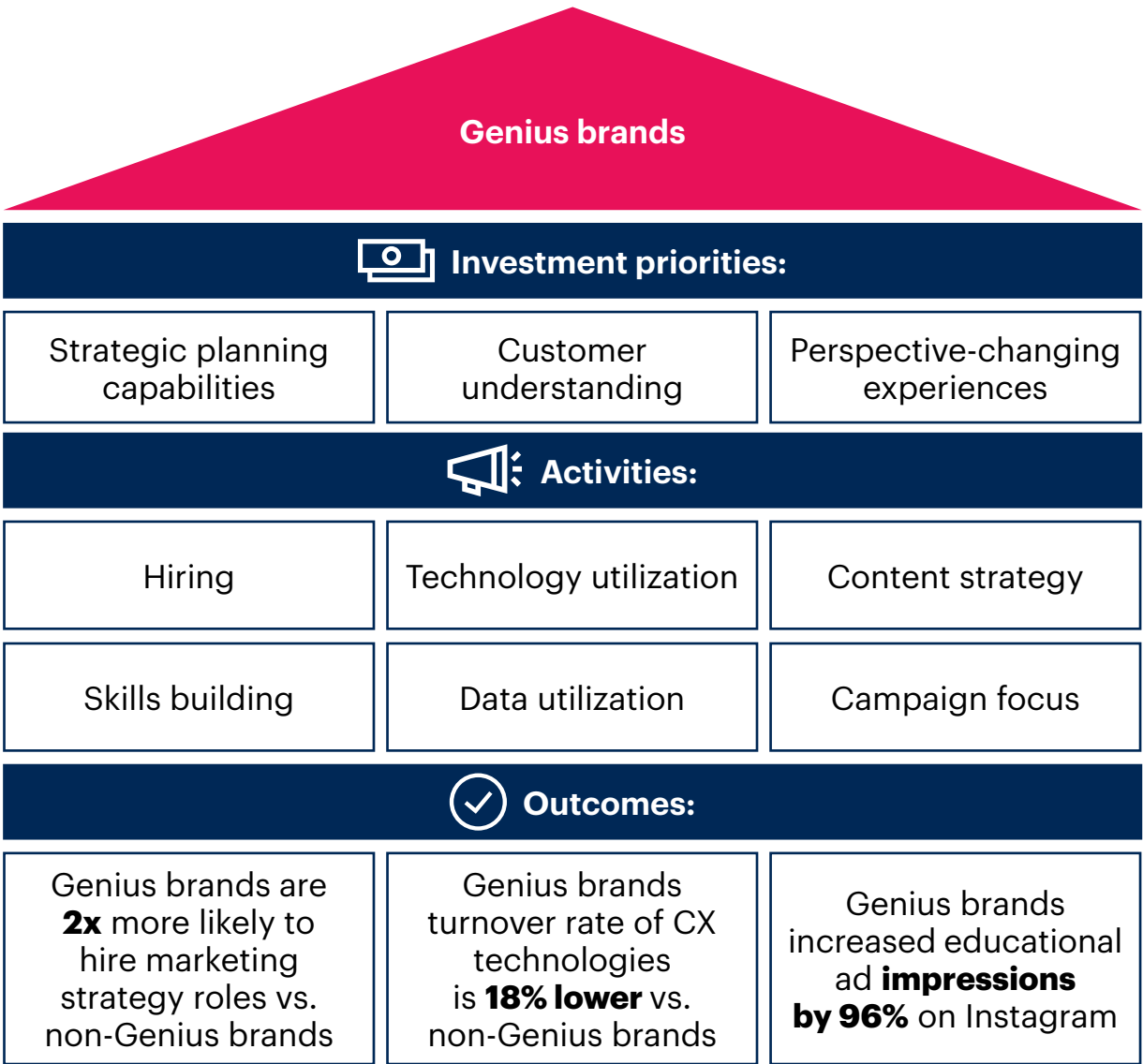
This year, Gartner has identified the key common characteristics of Genius brands by analyzing job postings, tech usage, public mentions, digital KPIs, press mentions, earnings calls and interviews.

These characteristics have been consolidated into three different investment priorities — strategic planning capabilities, customer understanding and perspective-changing experiences — to help CMOs grasp the components they must emulate in their strategies to achieve digital marketing excellence (see Figure 1).

From 2018 to 2023, 49% of Genius brands were new entrants into top positions in annual rankings, on average. In 2024, only 36% of Genius brands replaced existing 2023 Genius brands.

Source: Gartner Digital IQ Index Reports (2017 to 2024)

» Figure 1: An Overview of Genius Digital Marketing Brands



Source: Gartner



The command that Genius brands have over these three key areas has been crucial to their ability to outperform their peers, and brands must emulate these areas if they desire to get ahead.

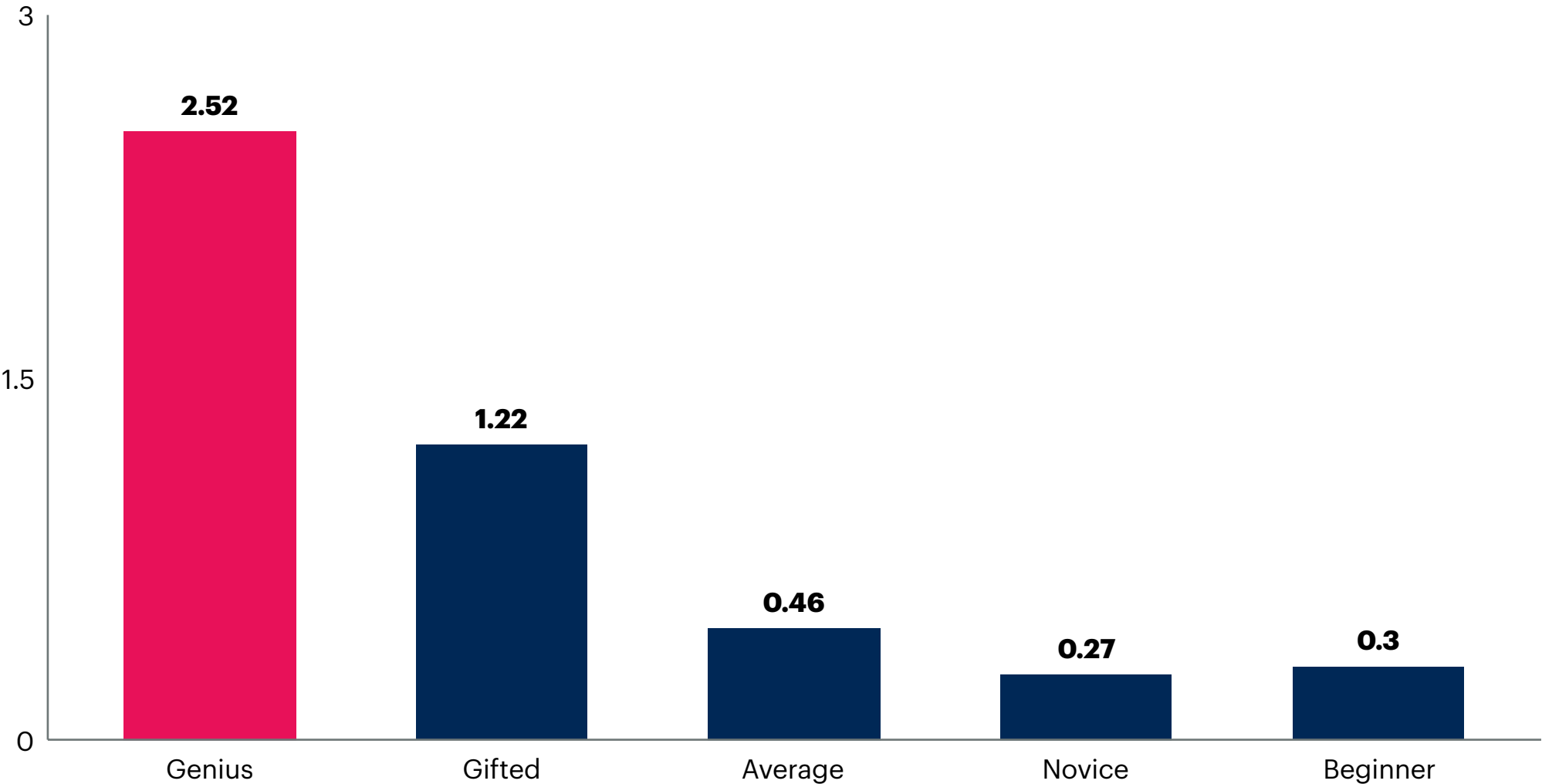
Priority 1: Focus on Long-Term Strategic Planning

The majority of CMOs struggle to balance long-term planning with short-term goals; according to Gartner’s 2025 CMO Strategy Survey, only 15% of CMOs develop long-range strategic plans (three years or more).<sup>1</sup> CMOs that have plans that extend at least 18 months are 1.5 times more likely to report high performance in their marketing efforts.<sup>1</sup> In addition to benefiting brands internally, consumers are more impressed by brands when they perceive them to have a long-term vision of success.<sup>2</sup>

Build Strategic Skills Through Hiring and Training

Genius brands prioritize strategy development in their approach to talent. They are more likely to dedicate headcount and teams to strategic planning. Genius brands hire for marketing strategy and marketing strategist roles at more than double the rate of non-Genius brands (see Figure 2).<sup>3</sup>

» **Figure 2: Genius Brands Invest in Marketing Strategists**  
Average Brand Hires for Marketing Strategy & Marketing Strategists by DIQ Class (January 2023 – June 2024)



n = 29,720 LinkedIn Job Postings (559 Gartner Digital IQ Brands)  
Source: Gartner analysis of Coresignal data



This approach to talent helps Genius brands be proactive in their strategies. Organizations that take a proactive posture to marketing strategy development are more likely to dedicate budget for training to develop marketing strategy planning and execution skills.<sup>1</sup> These skills will become an increasingly important stabilizer for brands to succeed during volatility and can be developed across marketing teams, regardless of roles.

“

I think if you walked in the shoes of a brand manager, a lot of people would be shocked at how operational and short-term that role can be... [Strategy] provides a thread to guide [the business when] the world is more complex than it ever has been.

**Fiona Lovatt, human insights director  
for nutrition in Europe**  
Coca-Cola<sup>4</sup>

### **Develop a Culture of Innovation to Progress Toward Long-Term Goals**

Having strong capabilities in long-term strategy enables Genius brands to innovate in marketing efforts for future success, rather than getting bogged down by short-term execution. With strategy embedded throughout the marketing function, brands can apply discipline in their application of innovation, pursuing targeted experimentation and training through experience.

The innovative nature of Genius brands can be seen publicly, as these brands are more than three times more likely

to be referenced for innovation in press mentions than other brands.<sup>5</sup> This public perception is no accident and is facilitated through their approach to talent.

Genius brands focus their hiring around skills that lend themselves well to supporting innovation. They more frequently seek soft skills (such as intellectual curiosity) and hard skills (such as data science and machine learning) that support innovation than other brands.<sup>3</sup> Change resulting from a culture of innovation can lead to staff burnout, which Genius brands recognize by seeking talent adept at dealing with ambiguity more frequently than their peers.<sup>3</sup>

Genius brand CMOs remain in their roles for over five years, compared to an average of 3.3 years for S&P 500 brands.<sup>6</sup>



## Priority 2: Invest in Customer Understanding

Despite their best efforts, most marketing leaders report their campaigns frequently miss targets for awareness, engagement, loyalty or ROI generation.<sup>7</sup>

This perceived poor performance is often caused by a lack of relevancy or resonance with target audiences, stemming from poor understanding of those audience members' needs. Across the U.K., U.S. and Canada, 58% of consumers feel that most companies trying to sell them products don't understand their preferences and needs.<sup>8</sup> This dynamic highlights a significant opportunity.

Enhancing customer understanding can improve touchpoint relevance, which, in turn, can increase content and media ROI.

### Invest in Tech That Enhances Customer Understanding

Genius brands are investing in technologies that enable them to better understand their customers and define and resolve key customer issues. This enhanced understanding helps them identify opportunities online and quickly pivot campaign plans when required. More so than any other marketing technology (martech) category, Genius brands are more likely to use technologies that support customer experience (CX) than non-Genius brands.<sup>10</sup>

“

The more granularly we understand our consumers, the better we can serve them. It's our job to make sure that we're not intruding or filling up their mailboxes with information that they're not going to [positively] react to.

**Ekta Chopra, chief digital officer**  
e.l.f. Cosmetics<sup>9</sup>

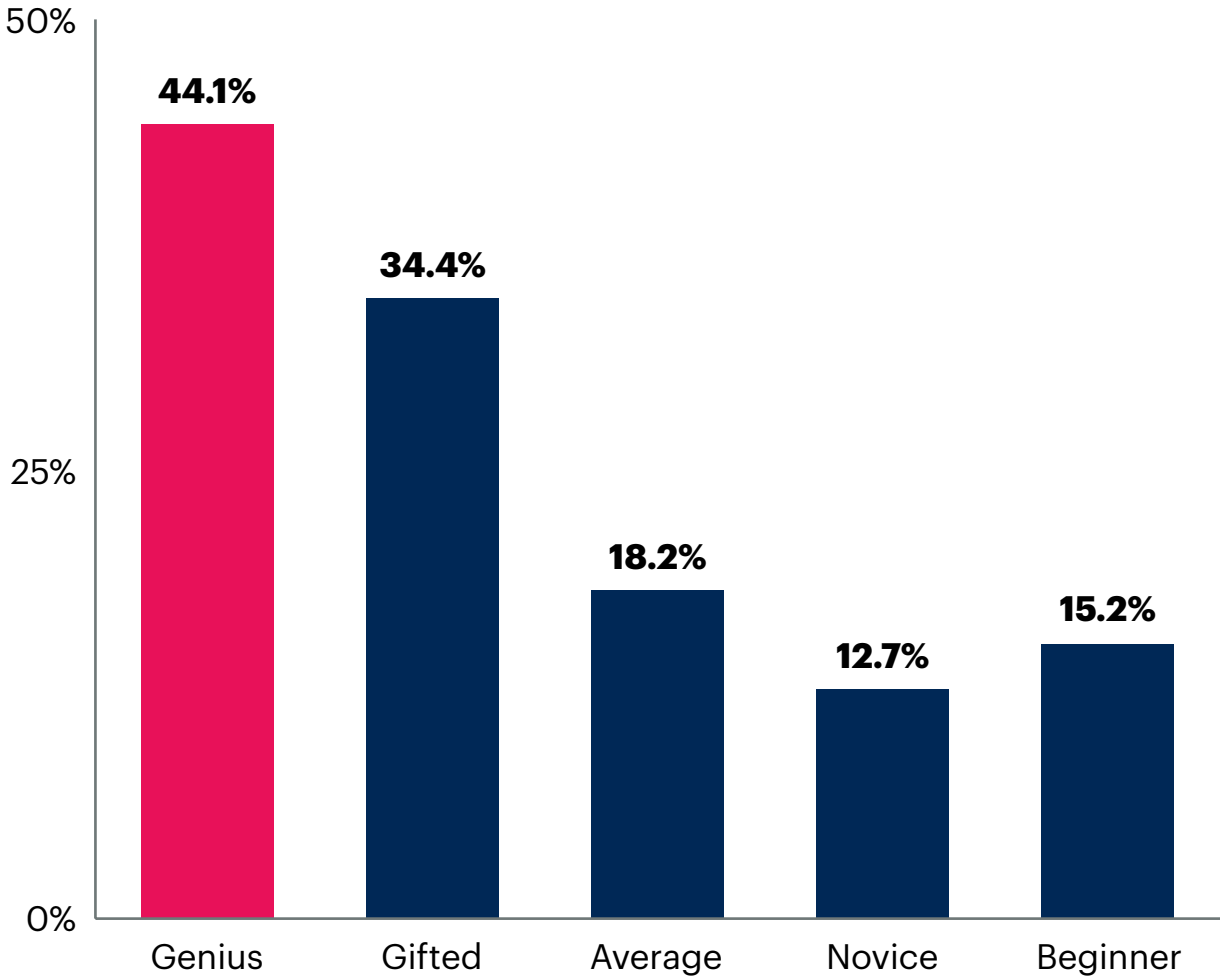




In particular, Genius brands are more likely to deploy at least one voice-of-the-customer (VoC) platform compared to brands with lower digital marketing maturity (see Figure 3).<sup>10</sup> Collecting data from indirect, direct and inferred sources of data enables them to better pinpoint moments that matter in customer journeys.

Utilization — a key piece of the ROI equation for martech — is where Genius brands’ long-term strategies show how they are able to succeed. These brands change platforms less frequently than lower-ranked peers, which gives them more time to develop processes and skills necessary to realize benefits from advanced features. For instance, turnover of Genius brand CX technologies was 18% lower than that of others between January 2022 and December 2024.<sup>10</sup> This stability gives them the foundation to implement talent strategies that further enhance technology utilization, deepening their overall customer understanding.

» **Figure 3: Share of Brands Deploying at Least One VoC Platform**  
By Digital IQ Class



n = 924 brands  
Source: Gartner analysis of BuiltWith data

### Priority 3: Develop Perspective Changing Experiences

Brands that can deliver perspective-changing experiences (such as ones where customers learn new information or ones that improve their opinion of the brand) have a greater chance of driving results. Gartner research shows that just one such experience doubles the likelihood of commercially productive behaviors.<sup>11</sup> Despite this, only 28% of U.S. consumers report ever having had a perspective-changing experience with a brand, indicating brands still have ample space to deliver meaningful experiences and activate their commercial potential.<sup>2</sup>

To deliver impactful content across digital touchpoints, Genius brands leverage both their strategic skill sets and strong customer understanding to pinpoint specific, unmet customer needs. Conversations with Genius brands have revealed how some align their org structures to the customer funnel stages to enhance accountability for affecting customer journeys. Others rely more on internal processes that make sense in their business context.

The results of these activities can be seen among the bold changes Genius brands are making to their content strategies.



Balance Branding and Educational Content With Product Promotions

In 2024, Genius brands dramatically shifted the focus of their social advertising campaigns to support higher-funnel interests. Compared to other brands, Genius brands typically place a relatively larger proportion of education-oriented ads (such as those with a focus on informing customers) than conversion-oriented ads (such as those that directly mention products or promotions).<sup>12</sup> This became far more pronounced last year. On Instagram, for instance, Genius brands’ year-over-year ad impressions grew by 96% for education-oriented ads, versus 28% for conversion-oriented ads.<sup>12</sup>

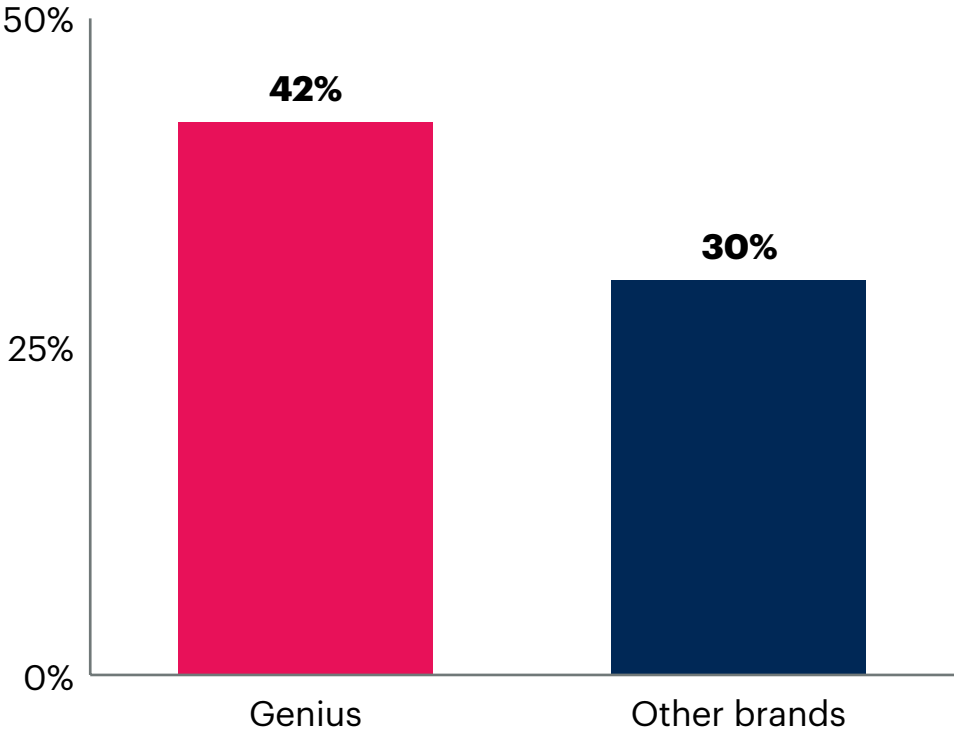
Shifts in content strategy are not restricted to media campaigns and can also be seen in the assets that Genius brands develop on their apps and sites. On these owned platforms, Genius brands seek to deliver meaningful, perspective-changing experiences through their educational content, typically in an interactive format that invites customer dialogue and participation.

Genius sites are more likely to feature interactive tools to solve customer use needs. They are also more likely to feature educational, interactive and gamified experiences among their top five most-visited website pages (see Figure 4).<sup>13</sup>

Where to Begin

To understand which areas to prioritize, CMOs should first build their awareness of their own strengths and weaknesses. Next, CMOs can compare themselves to other leaders to help identify opportunities. Investigate the profile of individual Genius brands within specific industries through Gartner’s Digital IQ research. Gartner can provide further analysis of industry-specific best practices and trends identified by leaders, which can help CMOs and their teams understand their own relative strengths and opportunities.

» Figure 4: Share of Brands That Have Educational, Interactive and Gamified Experiences as Top 5 Popular Pages  
Nov 2023 - Dec 2024



n = 206 Gartner Digital IQ Brands  
Source: Gartner analysis of Similarweb data



<sup>1</sup> **2025 Gartner CMO Strategy Survey.** This survey provides a comprehensive look at how chief marketing officers (CMOs) are shaping and implementing marketing strategies across various industries in North America (n = 211) and Europe (n = 192). The survey was conducted online from October through November 2024. It involved 403 respondents who play a significant role in marketing decision making and strategy alignment within their organizations. Eighty percent of these respondents represented companies with annual revenue exceeding \$1 billion. The survey included respondents from a diverse range of industries: tech services and products (n = 60), financial services (n = 50), consumer products (n = 42), retail (n = 39), healthcare (n = 38), pharma (n = 36), manufacturing (n = 36), media (n = 35), insurance (n = 34), and travel and hospitality (n = 33). Disclaimer: The results of this survey do not represent global findings or the market as a whole, but reflect the sentiments of the respondents and companies surveyed.

<sup>2</sup> **2025 Gartner Consumer Community** (n = 312, from 9 January through 16 January 2025). While the Gartner Consumer Community (n ≈ 500) resembles the U.S. general population, the data cited is based on the responses of community members who chose to take each activity. These samples may not be representative of the general population, and the data should only be used for directional insights.

<sup>3</sup> **Gartner analysis of Coresignal data.** Coresignal is Gartner’s data partner for employee and job postings data from LinkedIn, Glassdoor and Indeed. Gartner uses a combination of machine learning modeling and keyword fuzzy-matching to analyze word embeddings and text in the title and contents of job descriptions. From these models, Gartner produces skills, qualifications, and responsibilities sought within job posts. These samples may not be representative of the general hiring trends and the data should only be used for directional insights.

<sup>4</sup> [Coca-Cola’s Insights Director: Marketers Are Often Too ‘In the Weeds to Act Strategically](#), MarketingWeek.

<sup>5</sup> **Gartner analysis of Meltwater data.**

<sup>6</sup> **Gartner analysis of LinkedIn Sales Navigator data.**

<sup>7</sup> **2024 Gartner Channel and Campaign Management Survey.** This survey aimed to understand how marketing organizations should organize internal resources to manage effective campaigns, efficient channels and impactful content. It was conducted online from the end of July through mid-September 2024. In total, 418 respondents were surveyed in their native languages across North America (n = 194) and Europe (n = 224). Qualifying organizations reported enterprisewide annual revenue for fiscal 2023 of at least \$100 million, with 80% of the respondents coming from organizations with \$1 billion or more in annual revenue. The respondents came from a variety of industries: financial services (n = 67), insurance (n = 32), manufacturing (n = 43), consumer products (n = 38), retail (n = 40), travel and hospitality (n = 37), healthcare (n = 33), pharmaceuticals (n = 21), media (n = 29), tech products (n = 40), and IT and business services (n = 38). All the respondents were required to be senior decision makers in the marketing function, where they held significant responsibilities in setting or influencing overall marketing strategy and planning. They were also required to be involved in decisions pertaining to managing multiple marketing campaigns and/or advertising channels, as well as creating, managing and executing digital marketing strategy. Disclaimer: The results of this survey do not represent global findings or the market as a whole, but reflect the sentiments of the respondents and companies surveyed.

<sup>8</sup> **2024 Gartner Consumer Values and Lifestyle Survey.** The purpose of this survey was to understand consumer lifestyles and motivations. The research was conducted online in two parts, from 30 July through 28 August 2024 among 6,174 respondents in the U.S. (n = 4,146), Canada (n = 1,012) and the U.K. (n = 1,016). The first part of the survey included screening, demographic, sentiment, values and lifestyle questions. The second part included category-specific (for example, money and spending, retail, shopping, sustainability, health, and beauty) questions. Respondents were required to be at least 15 years old. Quotas in the U.S. were set for geographic areas, age, gender, ethnicity and employment status to approximate the U.S. population as a whole. Quotas in the U.K. and Canada were set for geographic areas, age, gender and employment status to approximate the U.K. and Canadian population as a whole.

<sup>9</sup> [How e.l.f. Cosmetics Drove a 125% Increase in Monthly Active App Users](#), Glossy.

<sup>10</sup> **Gartner analysis of BuiltWith data**, n = 924, Digital IQ Brands, January 2022 through December 2024. BuiltWith is a third-party web domain profiler that focuses on tracking technologies that underpin customer-facing web domains. BuiltWith indexes over 673 million websites, covering technologies related to advertising, e-commerce, web hosting and web content management.

<sup>11</sup> **2025 Gartner Marketing Personalization Survey.** This survey was conducted to explore which elements of marketers’ personalization efforts most impact customers’ journey experiences and commercial outcomes. The survey was administered online from November through December 2024.

<sup>12</sup> **Gartner analysis of Pathmatics data**, n = 233,153 Instagram ads, November 2022 through October 2023 versus November 2023 through October 2024. Pathmatics is a third-party data source that captures digital advertising data. Pathmatics estimates impressions and spend data based on panels of hundreds of thousands of mobile users across most social channels, with an additional desktop panel for Twitter.

<sup>13</sup> **Gartner analysis of Similarweb data.** n = 206 Gartner Digital IQ brands, November 2023 through December 2024. Gartner manually captures a standardized set of data points to determine site and app adoption of various features. This data is point-in-time, and is collected once per brand during the aforementioned date range.

<sup>14</sup> [Data Story: Gartner Digital IQ Index Score Breakdown](#)

Disclaimer: The results of the surveys do not represent global findings or the market as a whole, but reflect the sentiments of the respondents and companies surveyed.



# Gartner Digital IQ Index

Benchmark your brand's digital performance against industry competitors to prioritize investments and maintain relevance across channels.

Use the Gartner Digital IQ Index to:

Benchmark  
your brand



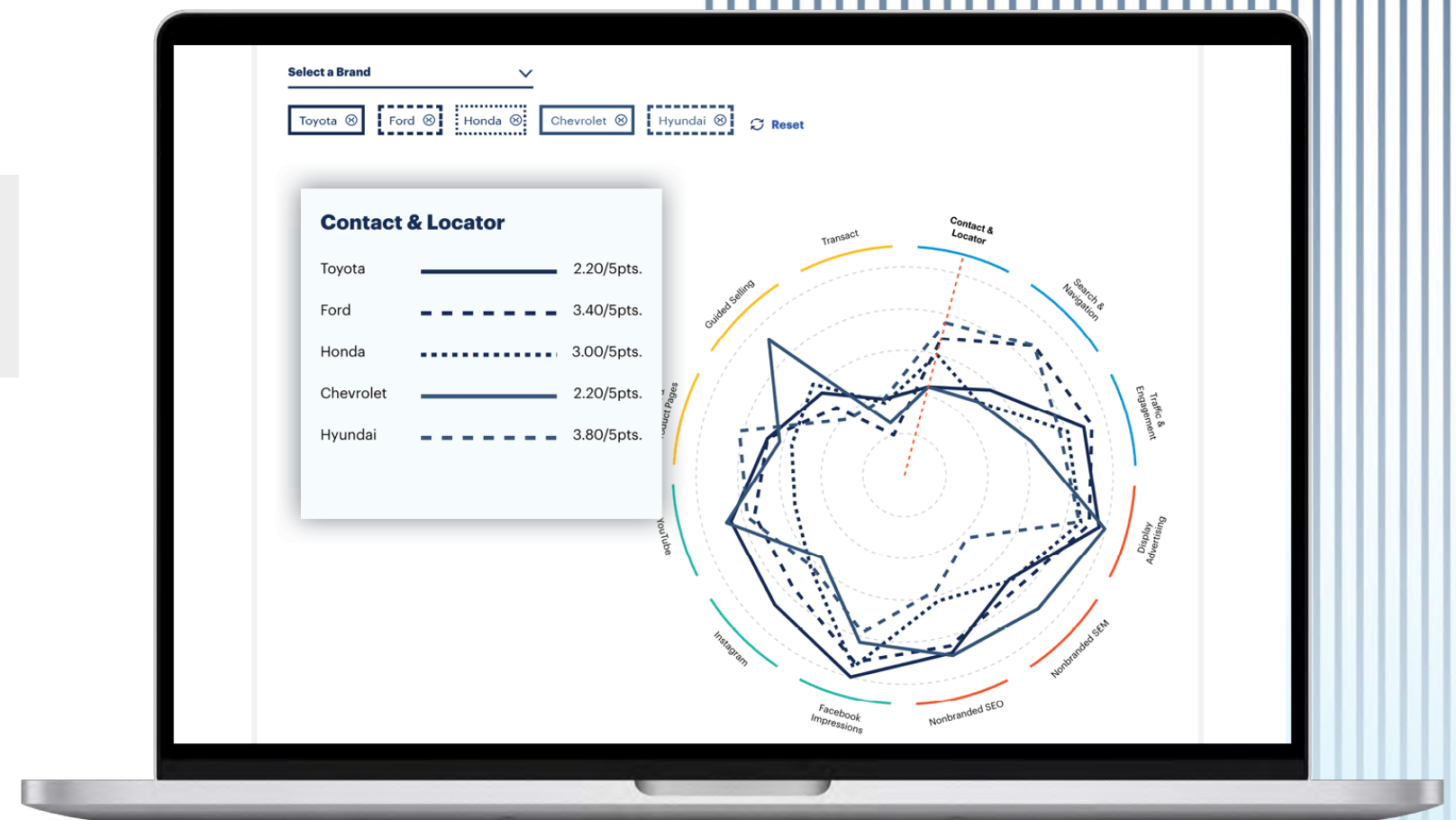
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# CMOs, Reassert Marketing's Role in **Growth Strategy**

by Amy Abatangle and Sharon Cantor Ceurvorst

Only 14% of CMOs make enterprise growth strategy decisions. Yet, those who take leading strategy roles are more likely to meet executive expectations and get full credit for marketing efforts. Learn how to surmount barriers and leverage marketing's strengths to drive growth.





New Gartner surveys highlight the gulf between C-suite expectations and CMO realities in driving enterprise growth. Fewer than half (48%) of marketing functions make major growth contributions, according to CEOs and CFOs.<sup>1</sup> Other executive leaders rank the CMO's influence behind the CEO, CFO and four other C-level roles.<sup>2</sup>

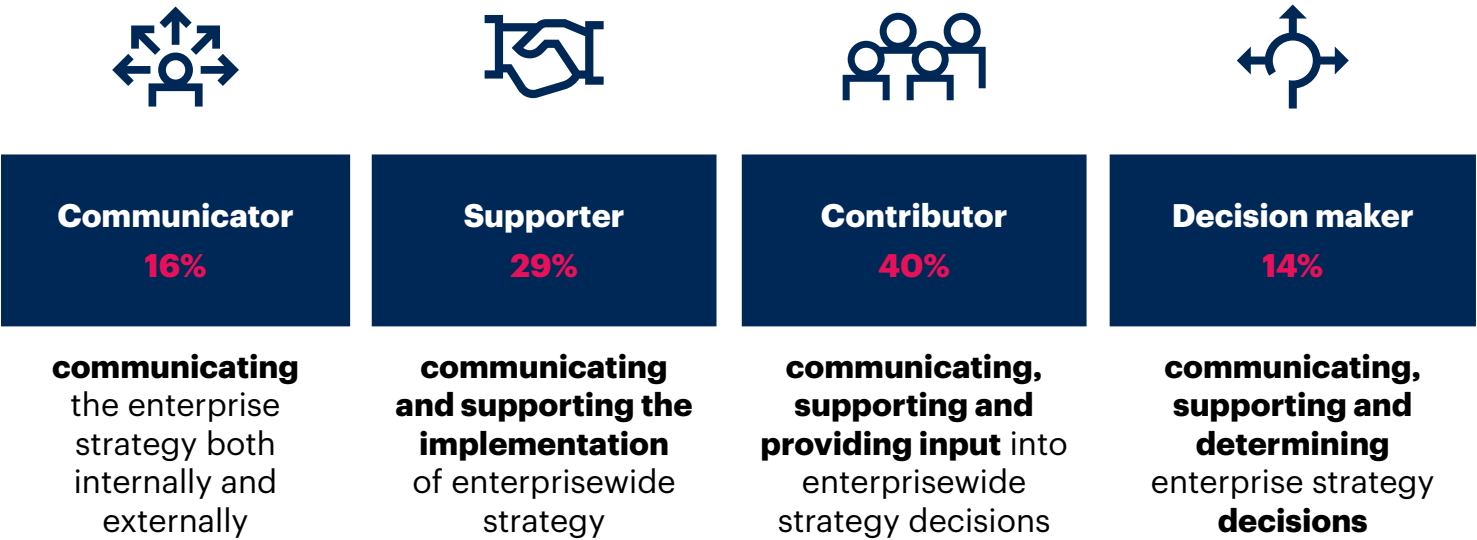
Yet, CMOs see themselves as second only to the CEO in influencing growth strategy decisions.<sup>3</sup>

Fewer than half (48%) of marketing functions make major growth contributions, according to CEOs and CFOs.<sup>1</sup>

To succeed, CMOs must play a greater role in driving growth — and get credit for it. Figure 1 shows a progressive profile of the CMO's role in enterprise growth strategy decisions.<sup>3</sup> Few CMOs are decision makers (see Figure 1).<sup>3</sup>

CEOs' and CFOs' top growth strategies — enhancing customer experience and introducing or improving products and services — play to marketing's strengths.<sup>1</sup>

» **Figure 1: CMO's Role in Enterprise Growth Strategy Development Progression**  
Percentage of respondents



n = 403 CMOs  
Q: Which of the following best describes your/your CMO's primary role in the development of your company's enterprise growth strategy?  
Source: 2025 Gartner CMO Strategy Survey  
Note: Percentages may not add up to 100% due to rounding.



Surprisingly, most CMOs report limited accountability in the planning and execution of these growth strategies (see Figure 2).<sup>3</sup>

CMOs who do lead strategy planning and execution are significantly more likely to exceed C-suite expectations:

- When CMOs are significantly involved in the planning of growth strategies, they are seven times more likely to exceed CEO and CFO expectations as compared to CMOs who are not as involved.
- When CMOs are significantly involved in the execution of growth strategies, they are 2.5 times more likely to exceed expectations as compared to CMOs who are not as involved.<sup>1</sup>

The most successful CMOs exhibit specific behaviors associated with improved perceptions of performance by CEOs and CFOs. Gartner describes these behaviors collectively as “market shaping.”<sup>1</sup>

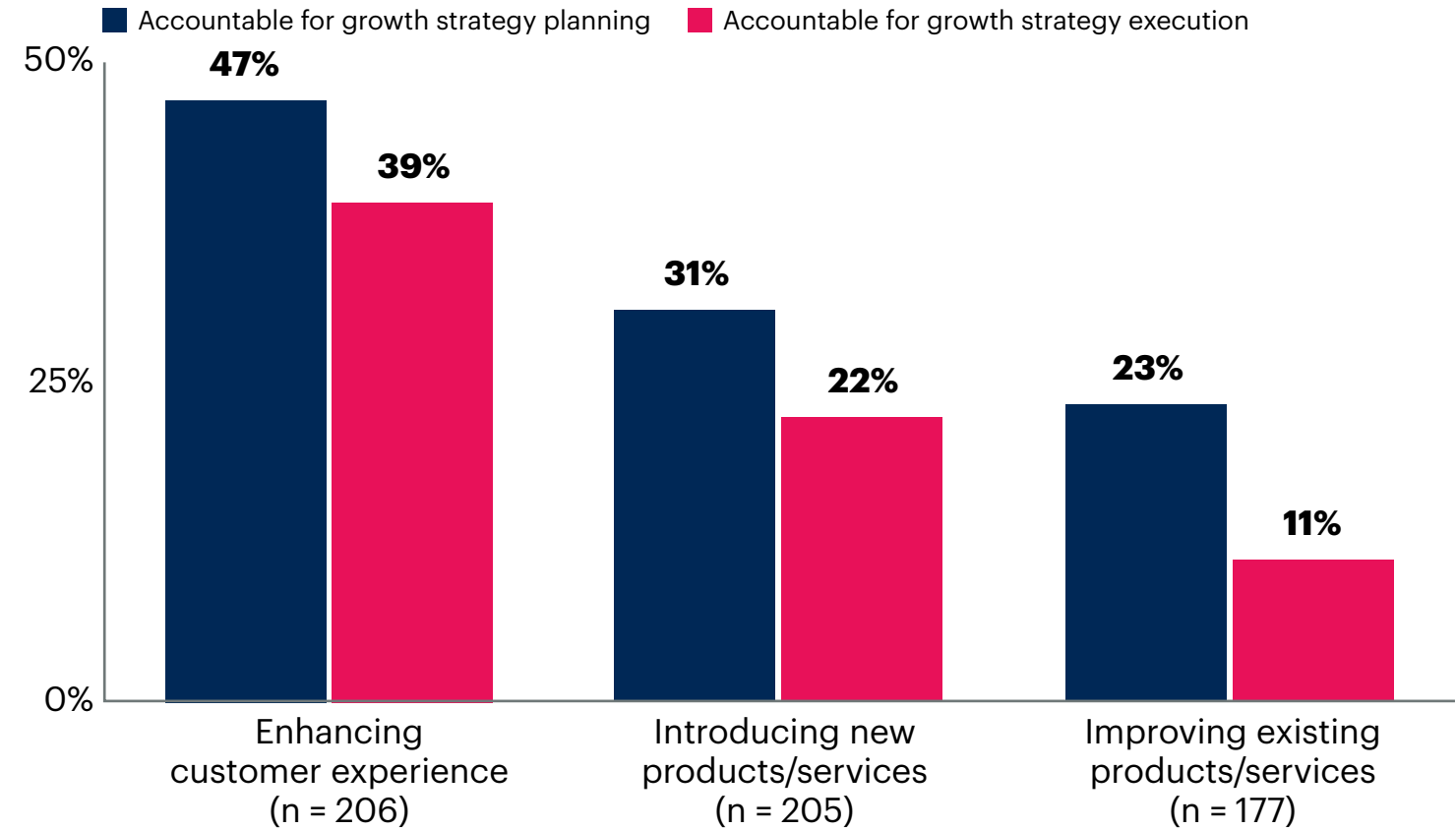
Four key market-shaper CMO behaviors make companies significantly more attuned to customers and market conditions:

- Customer influencer
- Customer advocate
- Market designer
- Market wayfinder

Market-shaper CMOs possess the ability to shift flexibly between behaviors as the situation demands. These behaviors not

CMOs should seek a more significant role in the planning and execution of growth strategies to meet CFO and CEO expectations.

» **Figure 2: CMOs’ Accountability in Planning and Executing Enterprise Growth Strategies**  
Percentage of respondents



n varies; CMOs, bases vary by chosen strategies among the top three for driving enterprise growth  
Q: What level of accountability will the marketing function have in the planning of each of these growth strategies?  
Q: What level of accountability will the marketing function have in the executing of each of these growth strategies?  
Source: 2025 Gartner CMO Strategy Survey



only solve today’s business challenges but also position the organization for future success (see Figure 3).

When compared to other organizations, companies whose **CMOs act as market shapers are 2.6 times more likely to exceed their annual revenue and profit targets.**<sup>1</sup> However, according to CEOs and CFOs, only 14% of CMOs are effective market shapers.<sup>1</sup> Nearly all (90%) of CMOs find one or more market-shaping behaviors a challenge.<sup>3</sup>

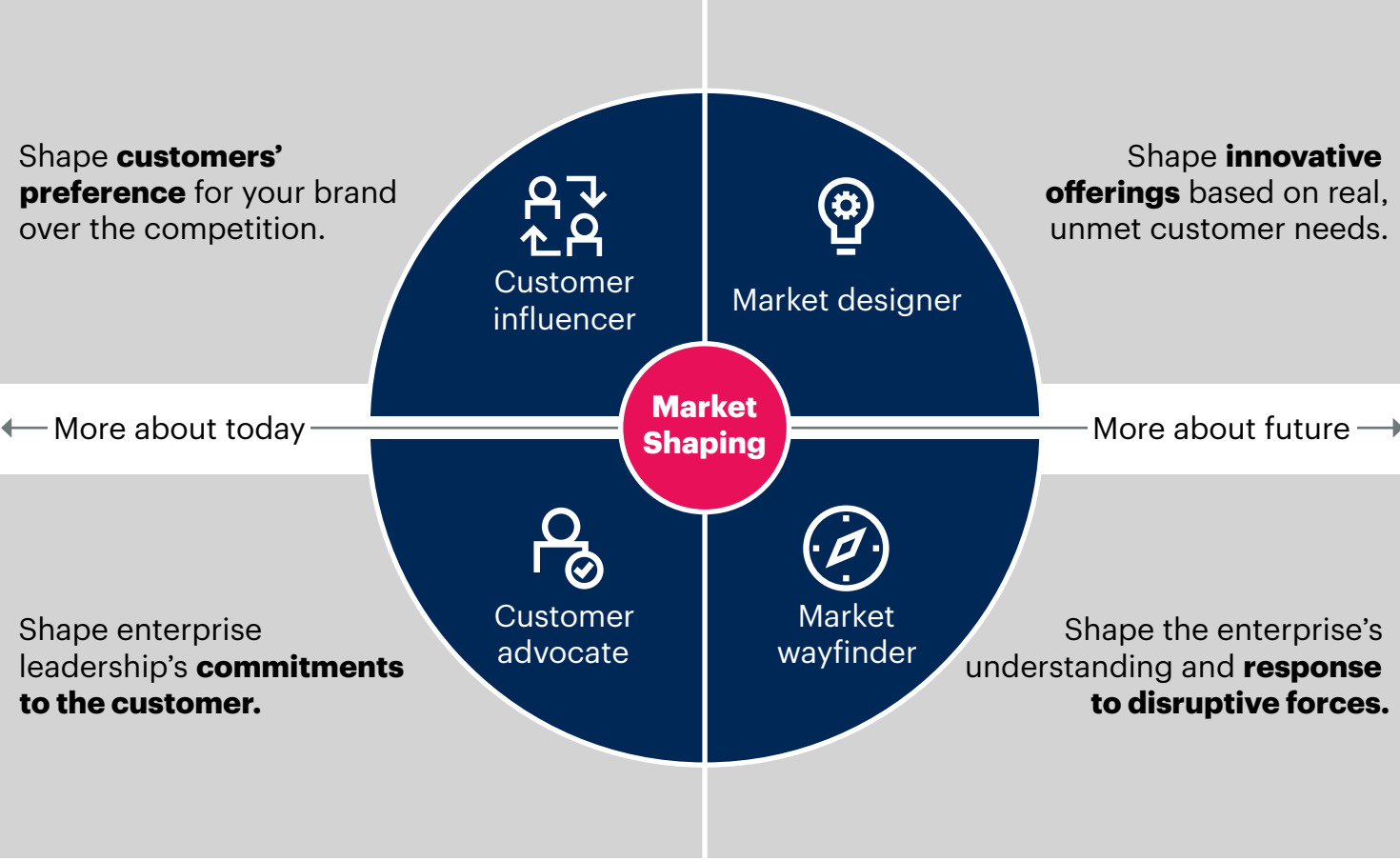
Over time, CMOs must improve their effectiveness at all four market-shaper behaviors. Fortunately, every incremental improvement drives better CMO performance and growth outcomes. Put another way, any increase in CMOs’ market-shaper effectiveness — including from ineffective to just somewhat effective — results in a positive step change in performance for CMOs themselves, their functions and their companies.<sup>1</sup>

**Recalibrate Marketing Capabilities for Strategic Impact**

Market-shaper CMOs succeed because they and their teams have specific skills and capabilities that make their companies significantly more customer- and market-oriented (see Figure 4). These elements are not mutually exclusive (in fact, they are mutually reinforcing), and they point to areas that require greater focus from CMOs and their teams for improving each market-shaper behavior.

When CMOs fail to lead C-suite understanding of markets and customers, they cede the core purpose of marketing to other functions, eroding their credibility and impact.

» Figure 3: Four Behaviors of Market-Shaper CMOs



Source: Gartner

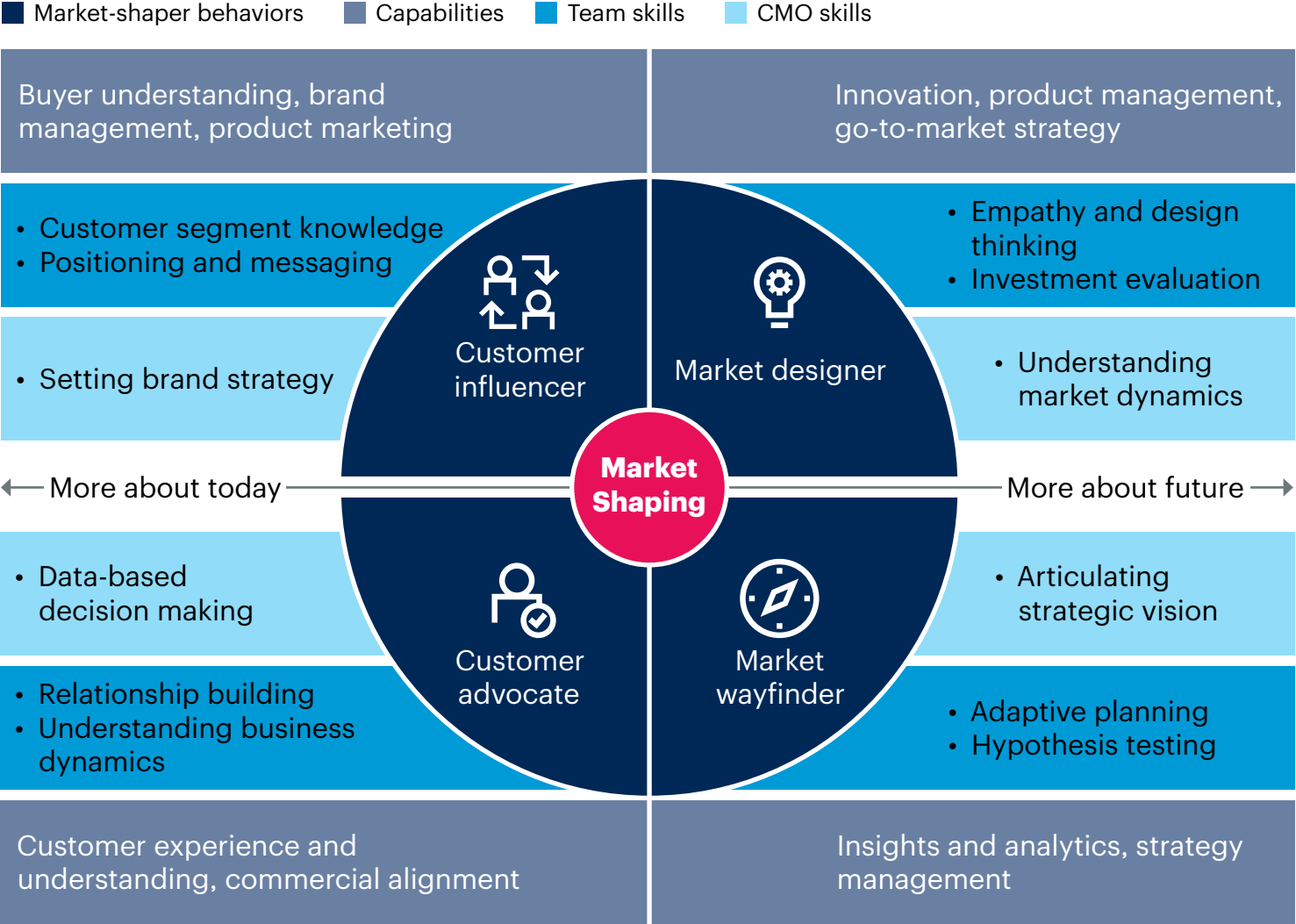


Today, the average marketing function is held accountable for five business areas. However, CEOs and CFOs expect that number to grow to eight areas in the next three to five years. The most common areas where marketing will **shift from involved to accountable** are customer experience, commercial alignment and product strategy — all central to top company growth strategies and market-shaping effectiveness.<sup>1</sup>

Today, CMOs who are responsible for driving growth through customer experience report similar business results to other CMOs. However, those who are responsible for the product-based growth strategies are more than twice as likely to report high marketing and business performance.<sup>3</sup>

- CMOs who take the lead on planning product-based growth strategies also make different choices than their peers about strategic plans and resources:
- These CMOs more frequently include sales channels and innovation strategy in their strategic plans versus other CMOs.<sup>3</sup> This speaks to their overall market orientation and a stronger role in sensing, responding to and shaping demand.
  - They are also more likely than their peers to allocate budget to tools for strategy development and execution management, as well as external resources for strategy development such as consulting or research.<sup>3</sup> This speaks to the importance of treating strategy management as an ongoing discipline, not a time-boxed activity.

» **Figure 4: Critical Components of Market Shaping**  
Essential capabilities and skills



Source: Gartner

## Build Complementary Personal and Team Skills

The core skills that underpin CMOs' market-shaping success are **data analysis** and **strategy**. Many CMOs struggle to use data effectively due to their own skills gaps, as well as not getting the customer and market insights they need from their teams. For example, the main data input most CMOs provide to shape growth strategy is data on campaign performance. Fewer than two-thirds of CMOs provide market research, customer analytics or competitive intelligence.<sup>3</sup>

Yet, 87% of marketing leaders report experiencing campaign performance issues in the last 12 months.<sup>4</sup> In other words: CMOs are using the performance of campaigns plagued by issues as an input to strategy. On the other hand, when CMOs focus on providing the enterprise with insight into customers and markets, not just campaign performance, they report that marketing has greater

influence over growth strategy than other functions. They are also less likely to report difficulty in gaining buy-in for their marketing plans.<sup>3</sup>

CMOs with data and analytics experience in their current role are 29% more likely to prove marketing's value and get credit for contributions. However, CMOs without data and analytics experience can compensate by using soft skills and storytelling tactics to communicate about data.<sup>5</sup>

To achieve this facility with data, CMOs rely on specific investments in their teams. Gartner's benchmarks show that CMOs of the highest-performing brands strengthen customer understanding by taking a long-term approach to key technologies, such as:<sup>6</sup>

- Customer experience tools
- Hiring talent to increase martech utilization
- Developing processes to increase the value of data

When it comes to strategy skills, CMOs must achieve a balance of personal proficiency and team-level support. For CMOs, strategy represents the combination of clear, aspirational vision — especially amid uncertainty — and compelling communication to build others' commitment and capability to change.

Success also requires discipline in strategy planning and execution management. Genius brands hire for marketing strategy and marketing strategist roles at more than double the rate of non-Genius brands.<sup>7</sup> And, CMOs who approach strategy development by proactively sensing and responding to market changes and/or competitive actions are more likely to allocate budget to training marketers on strategy, planning and execution skills than those using other approaches.<sup>3</sup>

CMOs should conduct a gap analysis of skills and capabilities by:

- Reviewing their long-term marketing strategy

- Identifying any structural and talent management issues that could affect their success
- Analyzing macroenvironmental trends that could affect the organization and the marketing function, influencing future strategy and required marketing capabilities

### As you do so, ask yourself:

- Which **market-shaper behavior** is most important to further develop so we can demonstrably drive growth strategies?
- Which of my **direct reports or departments** has the greatest gap to close in building those capabilities?
- What **enablement** would move them in the right direction over the next three to five years (e.g., skills, processes or technology)?



<sup>1</sup> **2024 Gartner Senior Executive Views of CMO Leadership Survey.** This survey was conducted to explore how CMOs are perceived by key C-suite leaders (i.e., CEOs and CFOs), and what distinguishes effective CMOs under different behavioral and company circumstances. The survey was administered online from August through September 2024 and includes data from 125 senior executives in North America (n = 84) and Europe (n = 41). Respondents were CEOs and CFOs at organizations with at least \$50 million in annual revenue, with 36% coming from organizations with at least \$1 billion in annual revenue. Respondents came from a wide variety of industries, including manufacturing and natural resources (n = 21); banking and financial services (n = 6); retail (n = 8); healthcare (n = 23); consumer products (n = 17); pharmaceuticals, biotechnology and life sciences (n = 6); insurance (n = 2); technology products (n = 14); travel and hospitality (n = 8); IT and business services (n = 16); and media (n = 4).

<sup>2</sup> **2024 Gartner C-Suite Dynamics Survey.** This survey was conducted online from 16 July through 16 August 2024 to discover how C-suite dynamics affect business value. Qualified respondents were direct reports to a CEO or equivalent and came from companies with at least \$1 billion in annual revenue. In all, 151 C-suite members from the Americas (n = 71), Europe (n = 45), and Asia (n = 35) participated.

<sup>3</sup> **2025 Gartner CMO Strategy Survey.** This survey provides a comprehensive look at how CMOs are shaping and implementing marketing strategies across various industries in North America (n = 211) and Europe (n = 192). The survey was conducted online from October through November 2024. It involved 403 respondents who play a significant role in marketing decision making and strategy alignment within their organizations. Eighty percent of these respondents represented companies with annual revenue exceeding \$1 billion. The survey included respondents from a diverse range of industries: tech services and products (n = 60), financial services (n = 50), consumer products (n = 42), retail (n = 39), healthcare (n = 38), pharma (n = 36), manufacturing (n = 36), media (n = 35), insurance (n = 34), and travel and hospitality (n = 33).

<sup>4</sup> **2024 Gartner Channel and Campaign Management Survey.** This survey aimed to understand how marketing organizations should organize internal resources to manage effective campaigns, efficient channels and impactful content. It was conducted online from the end of July through mid-September 2024. In total, 418 respondents were surveyed in their native languages across North America (n = 194) and Europe (n = 224). Qualifying organizations reported enterprisewide annual revenue for fiscal 2023 of at least \$100 million, with 80% of the respondents coming

from organizations with \$1 billion or more in annual revenue. The respondents came from a variety of industries: financial services (n = 67), insurance (n = 32), manufacturing (n = 43), consumer products (n = 38), retail (n = 40), travel and hospitality (n = 37), healthcare (n = 33), pharmaceuticals (n = 21), media (n = 29), tech products (n = 40), and IT and business services (n = 38). All the respondents were required to be senior decision makers in the marketing function, where they held significant responsibilities in setting or influencing overall marketing strategy and planning. They were also required to be involved in decisions pertaining to managing multiple marketing campaigns and/or advertising channels, as well as creating, managing and executing digital marketing strategy.

<sup>5</sup> **2024 Gartner Marketing Analytics and Technology Survey.** This survey was conducted to explore how senior marketing leaders approach proving the value of their function, how they perceive and collaborate with their marketing data and analytics teams, and how they are approaching generative AI and marketing technology utilization. The survey was administered online from April through May 2024 and includes data from 378 senior marketing leaders. These results represent marketers from North America (n = 187) and Europe (n = 191). Respondents were required to have decision-making authority over marketing budgets and

strategy at an organization with at least \$100 million in annual revenue. Forty percent of respondents came from organizations with at least \$3 billion in annual revenue. Respondents came from a wide variety of industries, including manufacturing and natural resources (n = 62); banking and financial services (n = 61); retail (n = 60); healthcare (n = 41); consumer products (n = 39); pharmaceuticals, biotechnology, and life sciences (n = 34); insurance (n = 32); technology products (n = 18); travel and hospitality (n = 12); IT and business services (n = 10); and media (n = 9).

<sup>6</sup> Gartner analysis of BuiltWith and Coresignal data. n = 480 Gartner Digital IQ Index Brands and 25,006 Job Postings.

<sup>7</sup> Gartner analysis of Coresignal data, n = 29,720 LinkedIn job postings.

Disclaimer: The results of these surveys do not represent global findings or the market as a whole, but reflect the sentiments of the respondents and companies surveyed.

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# How Your **Messaging** Drives B2B Buyer Decision Making

by Martin DeWitt, Sharon Cantor Ceurvorst, Hayden Norris, Nicole Coskren

Tailoring communication to individual buyers harms buying group consensus and lowers the likelihood of buying groups completing a high-quality purchase. CMOs can use this insight to craft messages and content that resonate with buyers and, simultaneously, support group buying decisions.





## Tailored Messaging Overlooks Group Buying Realities

Historically, B2B CMOs faced a choice between personalization and scale in buyer communication. The average B2B purchase involves five to 16 stakeholders across multiple functions, making it costly to tailor messages to each person.<sup>1</sup> However, technologies like generative AI now enable tailored messaging at scale. In fact, 89% of B2B buyers who recently considered an organizational purchase say they received supplier outreach tailored to their role.<sup>1</sup> Unfortunately, this approach can inadvertently harm deals.

Marketing messages can and should appeal to buyers' personal-level needs but not at the expense of buying group consensus. Gartner surveyed more than 600 B2B buyers to understand what resonates with them and leads to effective group buying decisions. B2B CMOs can use this research to:

- Appeal to B2B buyers' personal-level needs without excessive personalization that harms deals.
- Drive buying group consensus and high-quality deals by creating content that helps buying group members understand one another's perspectives and focus on shared, emotionally motivating needs and goals.

## Craft Messages That Connect Personally, Without Overpersonalization

When B2B buyers were asked directly about the factors that lead them to buy from one vendor over another, they cited the winning supplier's functional benefits, such as reliability, value for money and desired features.<sup>1</sup> B2B buyers want to think of themselves as rational actors, making the best possible decision on their company's behalf.

However, the reality of B2B buying is very emotional and even personal. B2B buyers experience a wide range of emotions throughout the buying process, ranging from excitement and optimism to disappointment and frustration.<sup>2</sup>

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When B2B buyers receive communication that's tailored to their role, their buying groups are 59% less likely to reach consensus and 40% less likely to complete a high-quality purchase.

Source: 2024 Gartner B2B Buyer Survey<sup>1</sup>



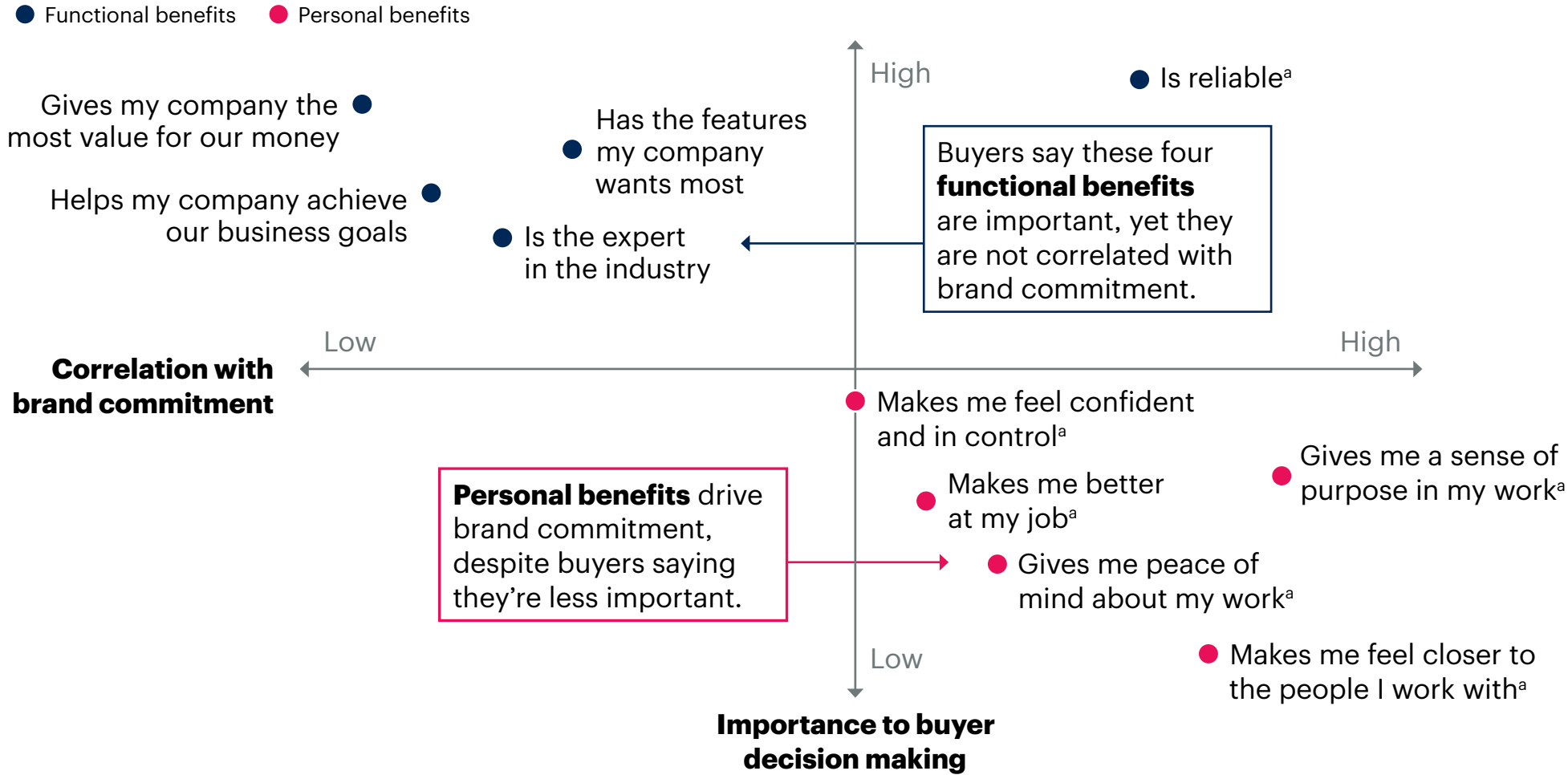
B2B buyers underestimate how much they are swayed by personal benefits. Personal benefits are ways in which your offerings fulfill buyers' psychological needs (such as a sense of security or autonomy). Although personal benefits have a low stated importance to B2B buyers, they are strongly correlated with brand commitment, which is defined as the combination of brand preference, connection and advocacy (see Figure 1).<sup>1</sup> Thus, using personal benefits to appeal to B2B buyers on a human level differentiates suppliers by increasing brand preference and advocacy through building personal connections with buyers.

Don't mistake personal for personalized. There's no correlation between whether B2B buyers perceive supplier messages as personalized to them as individuals and whether they experience personal benefits.<sup>1</sup> That's because personal benefits operate on a higher level than tailored messaging.

B2B buyers are 2.9 times more likely to have high levels of brand commitment when they perceive personal benefits in messaging from a supplier than when they perceive functional benefits.

Source: 2022 Gartner Brand Activation Survey<sup>3</sup>

» **Figure 1: Positioning Benefits' Importance to Buyers Versus Correlation With Brand Commitment**



n = 632 B2B buyers

Q. How does (winner) compare to (runner-up) on each of the following?; Which of the following are the most important factors for your decision about (winner) compared to (runner-up)?

Source: 2024 Gartner B2B Buyer Survey

<sup>a</sup> Denotes statistically significant association.

A complete B2B value proposition balances communicating your offerings’ functional and personal benefits in a way that appeals to multiple members of the buying group.

Identify the potential personal benefits to emphasize in your messaging by exploring the emotional implications of having (or not having) your offerings. Qualitative voice-of-the-customer research projects, such as customer interviews, focus groups or ethnographic research, can help reveal buyers’ emotional needs. In particular, you should interview satisfied customers to understand:

- The value they get from your products/services
- The emotions associated with their stated business needs
- The connection of those stated needs to higher-order benefits for the people involved

Messages about personal benefits to B2B buyers should naturally include functional elements as well. However, functional benefits are a minimum standard. Personal benefits are stronger sources of differentiation.

## Personalize for Collective Relevance

Even with resonant messaging in place, you still must decide how much to personalize and to whom. Gartner research reveals that personalization efforts should focus on driving buying group consensus. Buying groups with high levels of consensus are 2.5 times more likely to complete a high-quality deal (defined as an ambitious purchase that lives up to buyer expectations).<sup>1</sup>

The 2024 Gartner B2B Buyer Survey measured how three levels of supplier messaging relevance impact buying group consensus:

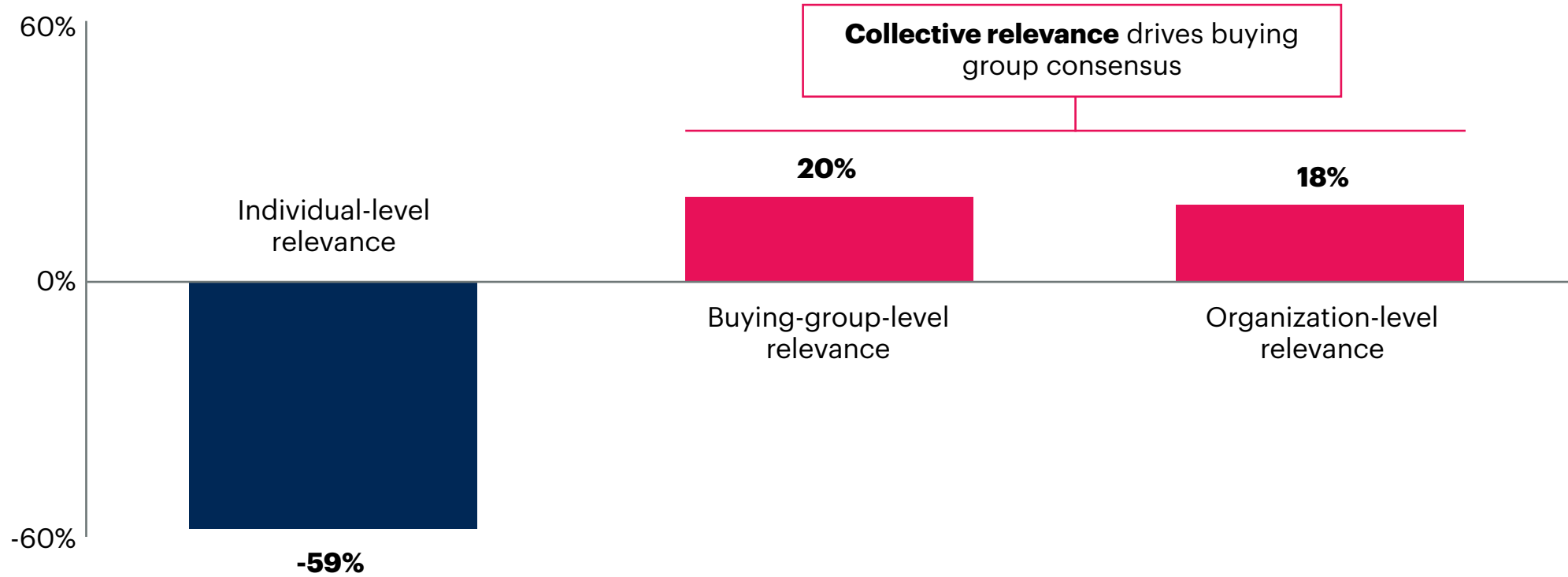
- **Individual** — Tailored to an individual buyer (i.e., helps buyers understand how they, specifically, would get value from a purchase)
- **Buying group** — Tailored to the collective buying group (i.e., helps buyers understand the perspectives of others in the group)
- **Organization** — Tailored to the buying group’s company (i.e., helps buyers understand their company’s needs or goals)



**Individual-level relevance** actually lowers the likelihood of buying group consensus by 59%.<sup>1</sup> The size and diversity of buying groups make it difficult to reach agreement on organizational needs, purchase requirements, and preferred suppliers and solutions. Tailoring messages to individual buyers further entrenches existing viewpoints and makes it harder to find common ground.

Instead, supplier messaging with buying group relevance and organizational relevance drives buying group consensus.<sup>1</sup> Together, the combination of buying-group-level relevance and organization-level relevance make up collective relevance (see Figure 2). Supplier messages with high collective relevance help buyers understand one another’s perspectives and focus on shared goals, fostering productive collaboration.

» **Figure 2: Impact of Level of Relevance on Buying Group Consensus**  
Percentage of B2B buyers



n = 632 B2B buyers  
Source: 2024 Gartner B2B Buyer Survey  
Note: Multiple regression model with controls for purchase category, relationship to supplier, purchase type, number of suppliers considered, purchase cost, buying group size, age, level in organization, experience with buying, IT procurement status, region, industry and organization revenue. Impact calculated as the percent increase in buying group consensus for each item as a function of model values at highest agreement with the items, all relative to lower agreement.

To create connective content (or content with high collective relevance), first develop **interpersonal personas**. Interpersonal personas are a modification of traditional buyer personas that capture the shared needs and goals — and potential points of friction — among buying group members. Gather this information by interviewing sales representatives and customers who recently completed a purchase, learning about different stakeholders involved as well as how they worked together.

Inevitably, conflicts arise in the buying group. Prepare buyers to resolve objections and tensions that slow progress. Curate a list of the common objections members of the buying group present to one another and work with product marketing and sales teams to write talking points responding to each one. Then, package these talking points into content on your website or through outbound messaging.

Other examples of connective content that improves buying group alignment include:

- Buyer enablement content that allows members of the buying group to understand how other stakeholders may use, interact with or benefit from your offering(s)

- Interactive tools that members of the buying group can use together to create a shared understanding of needs and priorities, such as a maturity assessment
- Content that educates the buying group how to navigate a critical, organization-level change that (a) has implications for the broader buying group and (b) can be more successfully executed using your offering(s)

By understanding group dynamics, CMOs can lead their teams in creating content that addresses the buying group's collective needs, promoting alignment and facilitating high-quality decision making.

## Deliver Personal Benefits and Collective Relevance

Above all, use connective content to deliver shared personal benefits to the buying group. Done right, shared personal benefits encourage the buying group to focus on shared, emotionally motivating needs and goals. Personal benefits are positively associated with buying group consensus because they remind stakeholders of the higher-order motivations that bring them together.<sup>1</sup>





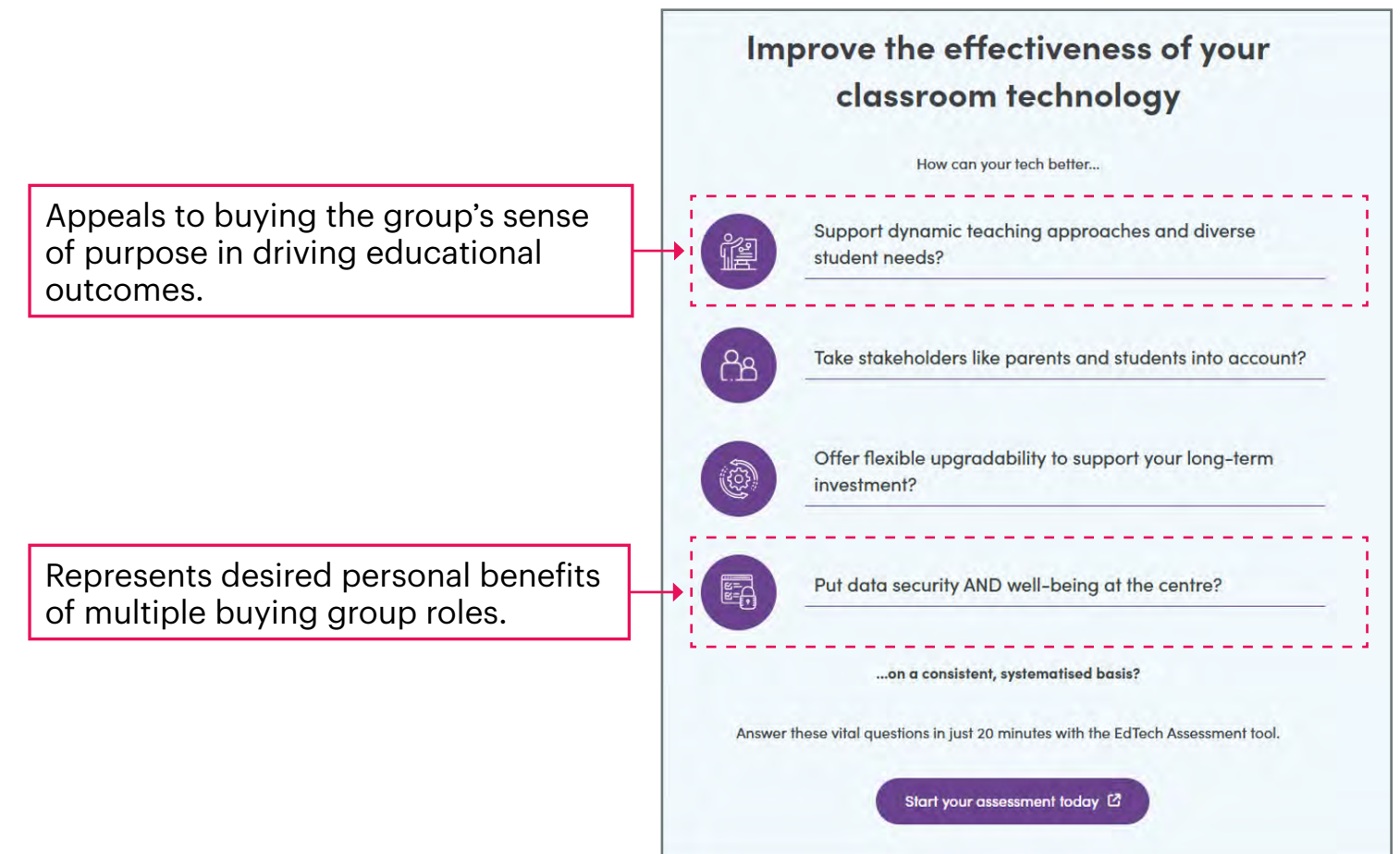
## Insight in Action: Collective Personal Benefits (SMART Technologies)

Educational technology company SMART Technologies offers an interactive maturity assessment to help buying group stakeholders align on strategic priorities. SMART’s messaging for the assessment highlights shared personal and functional benefits (see Figure 3).

First, the content grounds the buying group on a shared personal benefit: its shared sense of purpose to fulfill “diverse student needs.” It also includes language designed to call out and resolve potential tension points between stakeholders, such as encouraging the group to put “data security and well-being at the center.”

Customers report the assessment helps them drive strategic change and improve student outcomes. Likewise, the diagnostic enables SMART to engage higher-level strategic stakeholders who normally wouldn’t be part of a buying group but who have the authority to influence multiple purchase decisions.<sup>5</sup>

» Figure 3: How SMART Delivers Personal Benefits Through Connective Content



Source: Adapted from SMART Technologies

<sup>1</sup> **2024 Gartner B2B Buyer Survey.** This survey was conducted to explore how B2B buyers learned about potential suppliers, what factors influenced their decision to purchase from a specific supplier and their perceptions of personalization. The survey was administered online from August through September 2024 and includes data from 632 B2B buyers from North America (n = 502) and Europe (n = 130). Respondents who qualified for this survey were required to be employed full time at an organization with a total revenue of at least \$250 million (or equivalent) and have participated in a significant B2B purchase decision. A “significant B2B purchase decision” was defined as a decision that required deliberation with at least one other person and the evaluation of more than one potential supplier or vendor. Purchases included in this survey were made in a variety of categories, including manufacturing (n = 144), IT and high tech (n = 140), healthcare (n = 138), financial services (n = 115), non-IT business services (n = 57), and other (n = 35). Disclaimer: The results of this survey do not represent global findings or the market as a whole, but reflect the sentiments of the respondents and companies surveyed.

<sup>2</sup> **2023 Gartner B2B Buyer Interview Project.** This project was conducted to explore respondents’ experiences with a specific recent organizational purchase, including the objective for the purchase, challenges experienced during the purchase, who in their organization was involved, and their experiences with potential suppliers or vendors. Interviews were conducted from June through October 2023 and include data from 30 B2B buyers in the U.S. who were in the process of considering purchasing a new product/service from a new supplier, a premium or upgraded product/service, or new additional products/services from an existing supplier. Respondents were required to be employed full time at an organization with total revenue of at least \$250 million and involved in an organizational purchase decision of at least \$50,000. Respondents came from a wide variety of industries, including healthcare (n = 6), banking and insurance (n = 4), consumer products (n = 4), manufacturing and natural resources (n = 4), technology products (n = 3), pharmaceuticals (n = 2), retail (n = 2), and others (n = 5). Disclaimer: Results of this survey do not represent global findings or the market as a whole, but reflect the sentiments of the respondents and companies surveyed.

<sup>3</sup> **2022 Gartner Brand Activation Survey.** This survey was conducted to explore what drives brand differentiation in the ways that are most valuable to the enterprise. The survey was conducted online from June through July 2022 among 1,999 respondents, who were from North America (n = 1,510), APAC (n = 270), and Western Europe (n = 219). Respondents were full-time employees (n = 649), B2B buyers (n = 467), or consumers (n = 649). Fifty-six percent of the employees or buyers came from organizations that had at least 5,000 employees. Respondents answered questions about brands from a wide variety of industries, including healthcare (n = 346), manufacturing and natural resources (n = 311), retail (n = 273), consumer products (n = 215), financial services (n = 210), technology products (n = 164), travel and hospitality (n = 145), and IT and business services (n = 116). Disclaimer: The results of this survey do not represent global findings or the market as a whole, but reflect the sentiments of the respondents and companies surveyed.

<sup>4</sup> Gartner analysis of Grainger’s digital and offline advertisements, social media posts and website.

<sup>5</sup> [Case Study: Change Capability Diagnostic to Drive B2B Acquisition and Growth \(SMART\)](#)

Disclaimer: The organization (or organizations) profiled in this research is (or are) provided for illustrative purposes only, and does (or do) not constitute an exhaustive list of examples in this field nor an endorsement by Gartner of the organization or its offerings.





# Key Stats:

## The Customer Understanding Gap Limits Personalization

by Anna Maria Virzi, Emma Mathison

CMOs are heavily investing in personalization,<sup>1</sup> but without being rooted in thorough customer understanding, those personalization efforts might drive unintended negative consequences.

Although most CMOs believe they understand their customers, many customers disagree: 58% of consumers say brands fail to understand their needs and preferences.<sup>2</sup> Only 15% of B2C CMOs acknowledge shortcomings in customer understanding.<sup>3</sup>



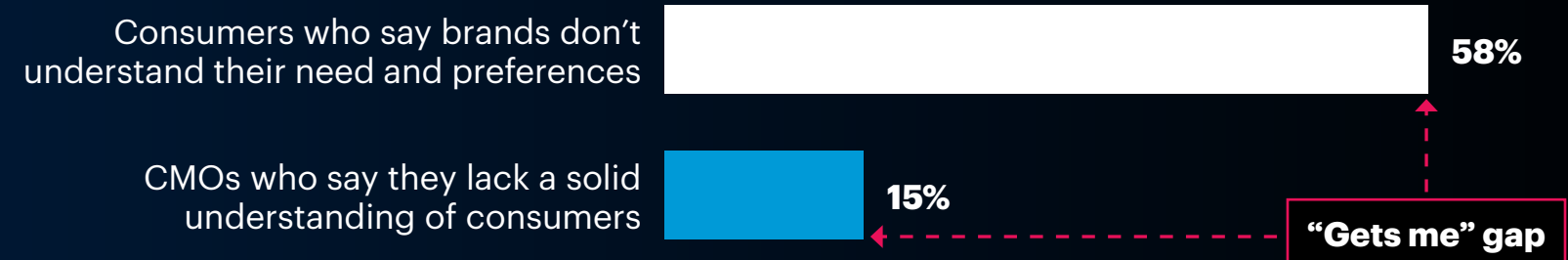
## “Gets me” gap exists between CMOs and consumers.

This significant disparity highlights a disconnect — the “gets me” gap — that brands need to address to attract customers, strengthen relationships and enhance brand trust and loyalty.<sup>3</sup>

## Nearly half of personalized digital communications miss the mark.

A lack of customer understanding can contribute to negative customer attitudes about personalized marketing communications. A recent Gartner survey found that 48% of customers perceived personalized digital communications as irrelevant, creepy or both.<sup>4</sup>

### » Figure 1: Percentage Who Believe Companies Don’t Understand Their Consumer Targets

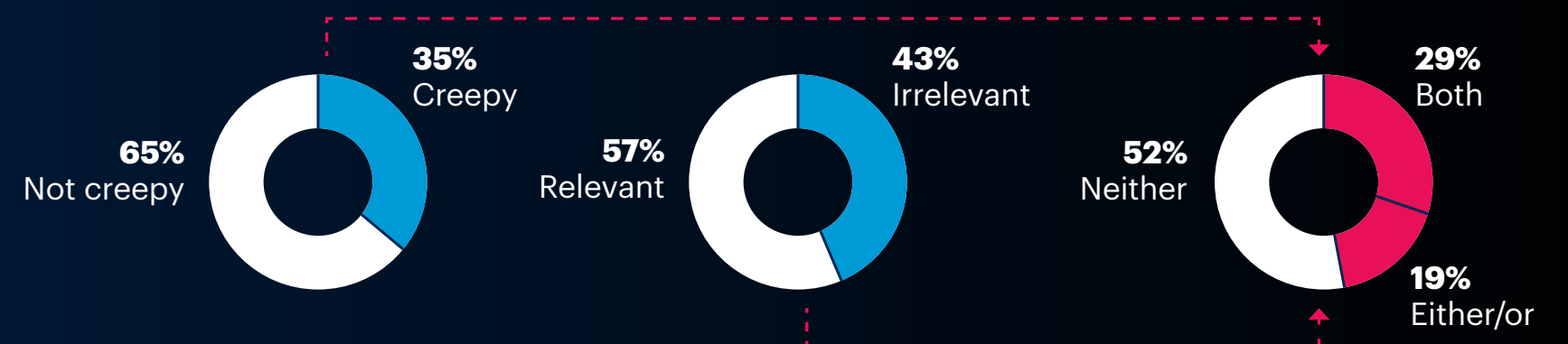


n = 4,146 U.S. consumers ages 15+; n = 82 U.S. B2C CMOs

Q: Consumer: Please read the below pairs of statements and indicate which you agree with more- that is, “much more” or just “somewhat more” than the other statement; Q: CMO: Please rate your agreement with each of the following statements

Source: 2025 Gartner CMO Strategy Survey/Consumer: 2024 Gartner Consumer Values and Lifestyle Survey

### » Figure 2: Customer Perceptions of Personalized Digital Communications



n = 1,210 consumers and B2B buyers

Q. To what extent did your digital interaction(s) ... :Use information about you that you found creepy or invasive?  
Use information about you in a way you found irrelevant?

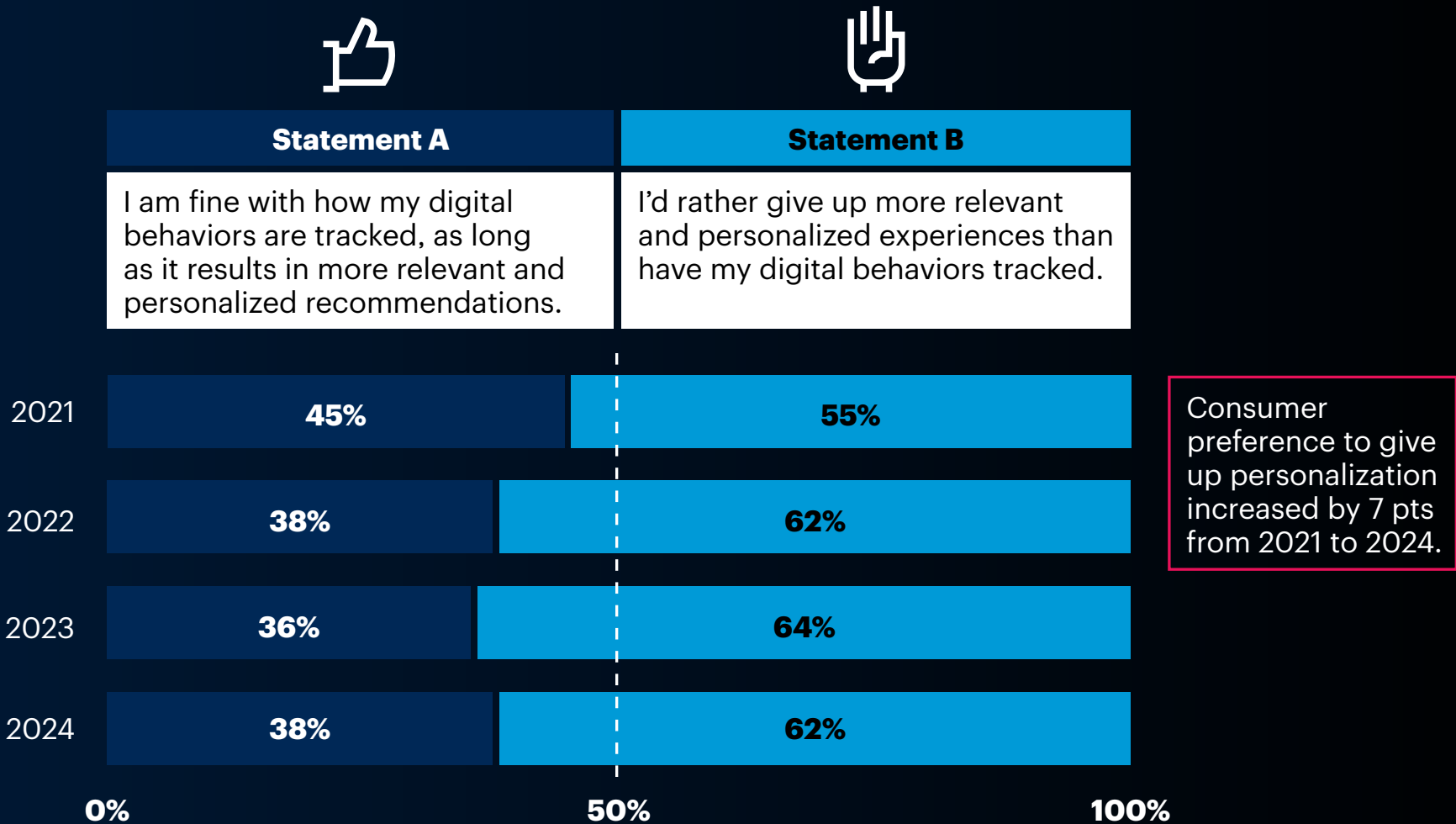
Source: 2025 Gartner Marketing Personalization Survey



Openness to data tracking in exchange for personalization declines.

A growing share of customers would rather give up more personalized experiences than have their digital behaviors tracked.<sup>2</sup>

» Figure 3: Percentage of Respondents Who Agree (Somewhat or Much More) With Each Statement



n = 1,555 ('21); 2,064 ('22); 1,934 ('23); 1,849 ('24); U.S. consumers age 15+  
Q. Please read the below pairs of statements and indicate which you agree with more- that is, "much more" or just "somewhat more" than the other statement.  
Source: 2021-2024 Gartner Consumer Values and Lifestyle Survey  
Note: Percentages may not total 100% due to rounding



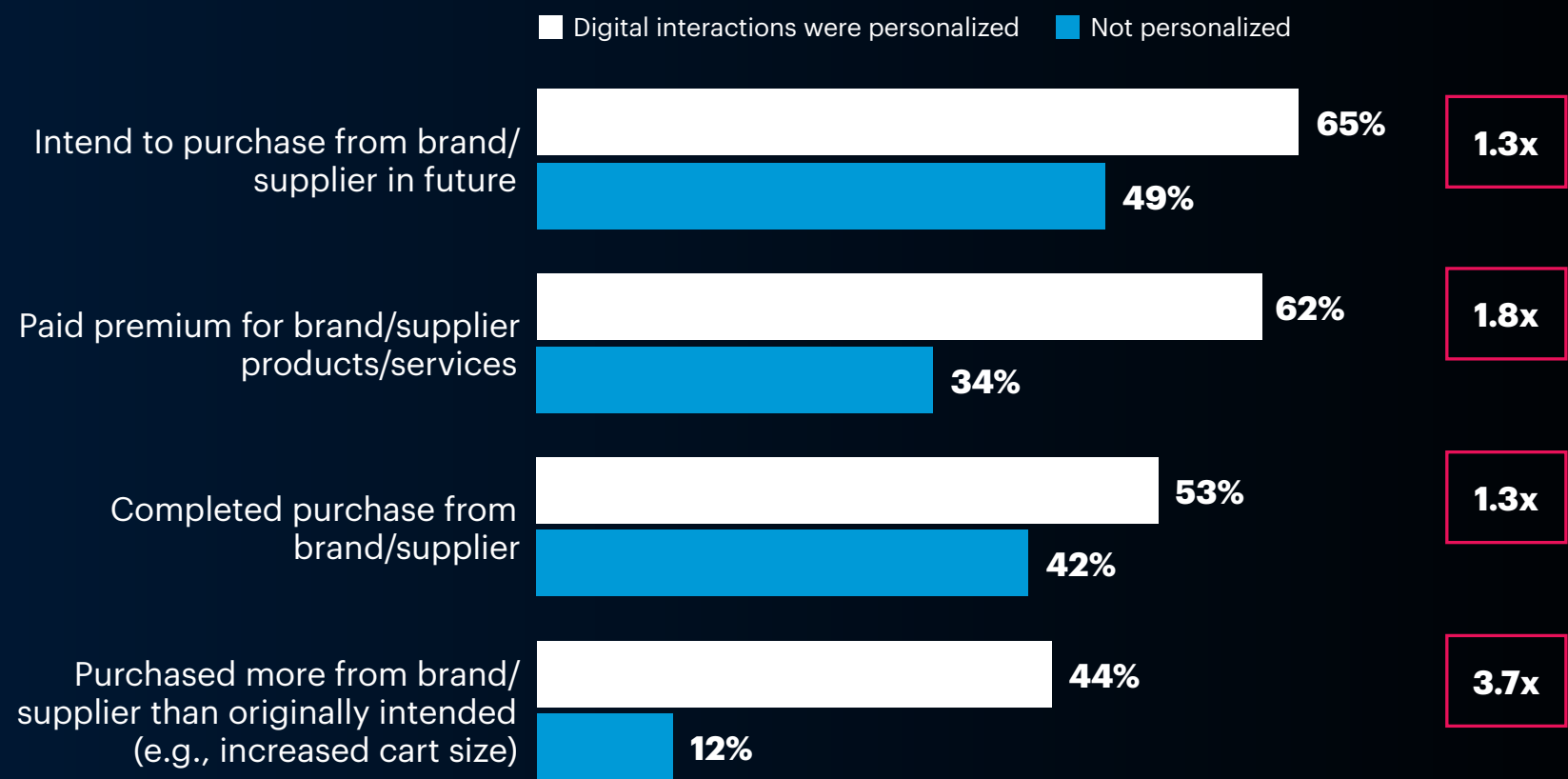
Personalization is commercially valuable.

Still, personalization offers brands a tremendous upside. Personalization of digital communications can boost commercial outcomes.

Recent Gartner research found that customers who received personalized communications were 3.7 times more likely to purchase more from a brand or supplier than originally intended compared to customers who did not receive personalized communications.<sup>3</sup>

» Figure 4: Commercial Outcomes of Recent Customer Journeys

By whether customer reported personalized digital interactions with brand/supplier



n varies; consumers and B2B buyers

Q: In your digital interactions with the supplier/brand you considered for purchase, did any digital interactions feel tailored, customized, or personalized specifically to you?

Source: 2025 Gartner Marketing Personalization Survey



Bridge the “gets me” gap.

So, how can brands use personalization to address the “gets me” gap without being seen as creepy or irrelevant? For one thing, they can apply data that consumers are most comfortable with brands using.

Consumers are more comfortable with brands using purchase history than their online browsing history.

Consumers are also more open to personalization based on communication preferences or personal preferences, such as a hobby.<sup>5</sup>

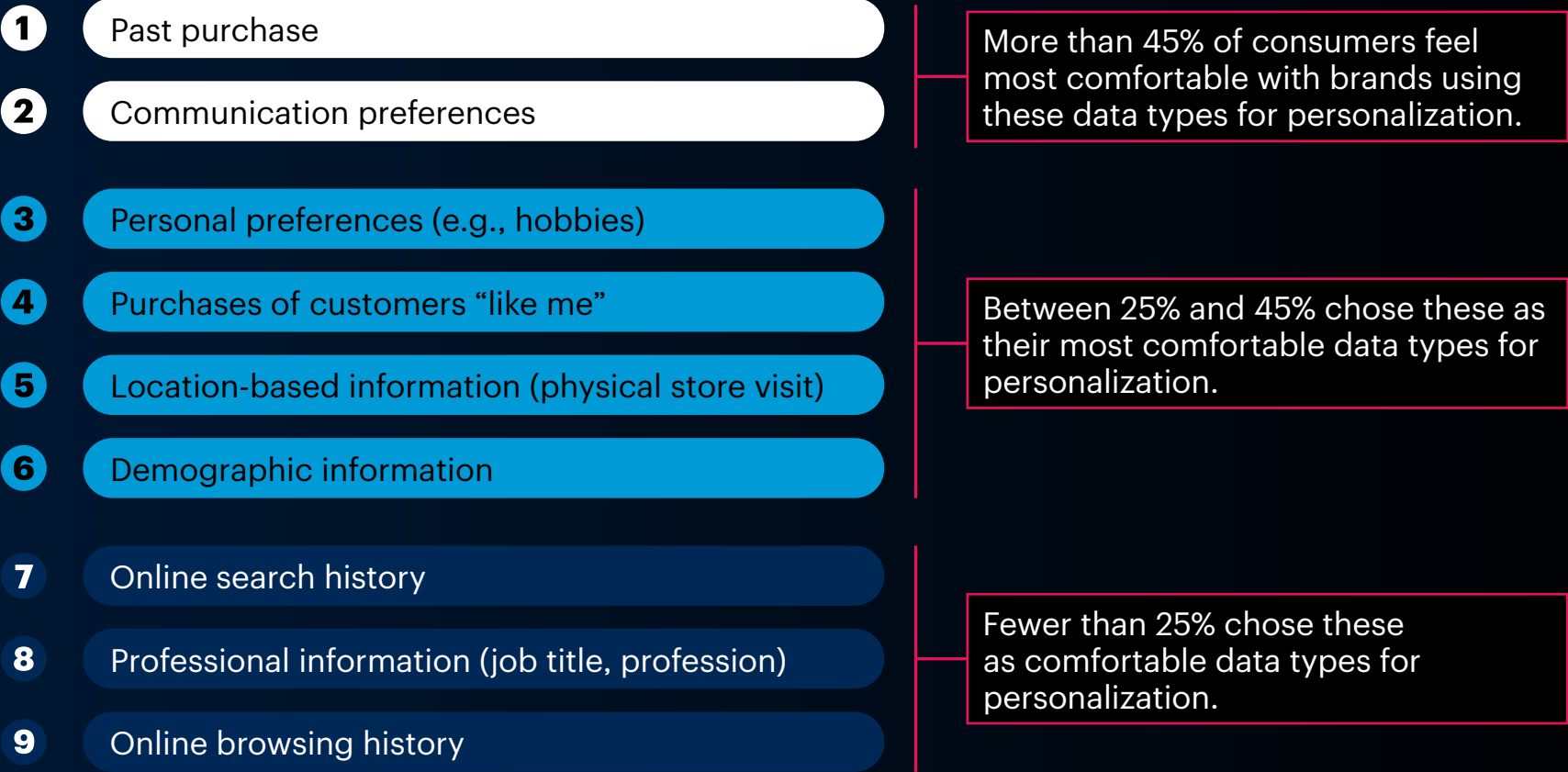
The bottom line for CMOs:

Insufficient customer understanding can undermine the effectiveness of marketing programs, especially those centered on personalization.

In fact, personalization that isn’t grounded in a deep knowledge of the customer can backfire and cause negative sentiment toward the brand. CMOs must invest in customer insights or else risk an erosion in their marketing program results.

» Figure 5: Data Types Consumers Are Most Comfortable With Brands Using For Personalized Messages

Rank order based on percentage of top 3 selections



n = 291 U.S. consumers age 18+  
Source: 2024 Gartner Consumer Community December 5 to 12 2024  
Note: Location-based information and demographic information tie when rounded to whole number percentages.





- <sup>1</sup> **2025 Gartner CMO Spend Survey.** This survey explored top-line marketing budgets with the goal of understanding how changing customer journeys, pressures from the C-suite and cost challenges affect marketing's spending priorities and channel effectiveness. Conducted online from January through March 2025, the research included 402 respondents from North America (n = 202), the United Kingdom (n = 97) and Europe (n = 103; including France, Germany, Belgium, Denmark, Finland, Netherlands, Norway and Sweden). Participants were required to be involved in decisions related to setting or influencing marketing strategies/planning, aligning marketing budgets/resources, or leading cross-functional programs and strategies with marketing. Seventy-seven percent of the respondents represented organizations with annual revenue of \$1 billion or more. The respondents came from a diverse range of industries: manufacturing (n = 52), financial services (n = 50), insurance (n = 43), consumer products (n = 43), healthcare (n = 42), travel and hospitality (n = 37), IT and business services (n = 36), retail (n = 36), pharma (n = 32), and media (n = 31). Disclaimer: Results of this survey do not represent global findings or the market as a whole, but reflect the sentiments of the respondents and companies surveyed.
- <sup>2</sup> **2024 Gartner Consumer Values and Lifestyle Survey.** The purpose of this survey was to understand consumer lifestyles and motivations. The research was conducted online in two parts, from 30 July through 28 August 2024 among 6,174 respondents in the U.S. (n = 4,146), Canada (n = 1,012) and the U.K. (n = 1,016). The first part of the survey included screening, demographic, sentiment, values and lifestyle questions. The second part included category-specific (for example, money and spending, retail, shopping, sustainability, health, and beauty) questions. Respondents were required to be at least 15 years old. Quotas in the U.S. were set for geographic areas, age, gender, ethnicity and employment status to approximate the U.S. population as a whole. Quotas in the U.K. and Canada were set for geographic areas, age, gender and employment status to approximate the U.K. and Canadian population as a whole.
- <sup>3</sup> **2025 Gartner CMO Strategy Survey.** This survey provides a comprehensive look at how CMOs are shaping and implementing marketing strategies across various industries in North America (n = 211) and Europe (n = 192). The survey was conducted online from October through November 2024. It involved 403 respondents who play a significant role in marketing decision making and strategy alignment within their organizations. Eighty percent of these respondents represented companies with annual revenue exceeding \$1 billion. The survey included respondents from a diverse range of industries: tech services and products (n = 60), financial services (n = 50), consumer products (n = 42), retail (n = 39), healthcare (n = 38), pharma (n = 36), manufacturing (n = 36), media (n = 35), insurance (n = 34), and travel and hospitality (n = 33). Disclaimer: The results of this survey do not represent global findings or the market as a whole, but reflect the sentiments of the respondents and companies surveyed.
- <sup>4</sup> **2025 Gartner Marketing Personalization Survey.** This survey was conducted to explore which elements of marketers' personalization efforts most impact customers' journey experiences and commercial outcomes. The survey was administered online from November through December 2024. It includes data from 1,464 B2B buyers and consumers in the U.S. and Canada (n = 961), the U.K. (n = 265), and Australia and New Zealand (n = 238). B2B buyers (n = 556) came from a wide variety of industries, including manufacturing and natural resources (n = 152); technology products (n = 106); banking and financial services (n = 80); healthcare (n = 58); retail (n = 39); pharmaceuticals, biotechnology, and life sciences (n = 28); and others (n = 93). Disclaimer: The results of this survey do not represent global findings or the market as a whole, but reflect the sentiments of the respondents and companies surveyed.
- <sup>5</sup> **2024 Gartner Consumer Community Survey.** Gartner Consumer Community (n = 291, 5 to 12 December 2024). While the Gartner Consumer Community (n ≈ 500) resembles the U.S. general population, the data cited is based on the responses of community members who chose to take each activity. These samples may not be representative of the general population and the data should only be used for directional insights.





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# 3 Steps to Drive Loyalty With a Customer-First, Channel-Second Strategy

by Leah Leachman

Strategies that prioritize channels over customers fail to foster long-term loyalty. By focusing first on customer expectations and goals, CMOs can build stronger relationships that drive growth and enhance engagement.





Market-shaper CMOs — those CMOs with strong positioning, innovation capabilities and deep customer understanding — are eight times more likely than non-market-shapers to exceed CEO and CFO expectations. Yet only 14% of CMOs are seen as market shapers by executive leaders.<sup>1</sup>

Achieving this leadership stance will require adjustments to most marketers’ current approach, as customer understanding and customer experience management is a critical capability gap for most marketing teams. It has ranked in the top 10 CMO-reported capability gaps since 2022.<sup>2</sup>

This continued gap means that digital investments are often driven first by channel selection, rather than starting with customer needs, expectations and goals. This results in poor channel and investment decisions that limit sustainable growth through customer loyalty, advocacy and retention. For example, 87% of CMOs reported performance issues with their marketing campaigns throughout the last 12 months.<sup>3</sup>

One reason: Many consumers don’t feel understood by brands. Fifty-eight percent of U.S. consumers say the companies trying to sell them something don’t have

a good understanding of their needs and preferences, according to the 2024 Gartner Consumer Values and Lifestyle Survey.<sup>4</sup> This isn’t just a problem for B2C brands; B2B buyers also penalize brands that demonstrate a lack of customer understanding. Seventy-three percent of B2B buyers agree they avoid doing business with suppliers that send them irrelevant messages.<sup>5</sup>

To reverse lagging performance through better customer experience, follow these three steps.

**Step 1: Develop a Customer-Centric Experience Thesis Statement**

A customer-centric experience thesis statement defines what your target customers expect your brand to deliver and how meeting those expectations drives positive outcomes for your business. Many brands jump directly into channel execution and skip creating a clear, customer-centric value statement that will serve as their marketing strategy’s compass. Creating an experience thesis statement helps CMOs better evaluate how each decision ties back to their central tenet of customer centricity, so as not to succumb to distraction by novelty or common biases.

The thesis statement ensures you focus your efforts on the customers your company has the greatest upside with. The goal of developing the thesis statement (see Table 1) is twofold:

- It ensures that the experience helps customers accomplish something they’ll derive value from.
- It secures agreement from all stakeholders on the specific business target that this experience will help the company achieve.

» **Table 1: The Experience Thesis Statement Framework**

The <b>Who</b>	The target persona(s)
The <b>Why</b>	The persona’s goal or objective
The <b>What for the Customer Persona</b>	What defines success from our persona’s point of view?
The <b>What for the Business</b>	The target outcome for our business

Source: Gartner

Start with finding “the who.” Effective experience thesis statements are based on customer insights and data — not assumptions. To ensure you target efforts toward the most relevant customer group, you should:

- Strengthen your customer personas with insights to inform the thesis statement.
- Gather key customer insights, if you do not have customer personas in place, to inform your thesis statement.

After you have defined the right customer persona, identify the relevant internal audience to co-author the remainder of the experience thesis statement. Use your existing customer experience governance or collaboration team, or recruit a team of cross-functional representatives with a direct or indirect influence on the delivery of experiences throughout the persona-driven customer journey.

This cross-functional team should create the experience thesis statement when setting goals and objectives for customer experience and marketing communications initiatives. This ensures all decisions are anchored from the outside-in. See Table 2 for a hypothetical example for a wearable device company.

» **Table 2: Theoretical Experience Thesis Statement**

The <b>Who</b>	Fitness enthusiasts who pride themselves on being well-researched and value guidance on how to maximize and learn from their own data to make healthy decisions.
The <b>Why</b>	The consumers have recently transitioned back to a more vigorous fitness regime after a long period away from training. They want to regain their endurance and activity levels, but they want to take a smart approach by using their own data to learn how their body responds to ease back in safely and without injury.
The <b>What for the Customer Persona</b>	They want to feel confident they will receive personalized guidance and recommendations informed by their fitness data and in a way that they couldn’t glean on their own.
The <b>What for the Business</b>	Increase daily utilization of the health insights dashboard by 15%. Reduce annual customer churn by 10%.

Source: Gartner

Cross-functional leaders should emphasize the experience thesis statement as a starting point for all decisions. To do this, consider using a “Does it relate to the thesis?” (DIRTT) approach to project kickoffs, channel performance reviews and strategic planning meetings. To ensure this exercise is continuous, encourage posting the acronym somewhere visible. The more frequently this process occurs upfront, the more likely these practices will become ingrained in your culture. One way for marketing to solidify this practice is to make a customer-focused thesis statement a requirement for new project intake forms.

**Step 2: Align the Thesis Statement to Critical Moments in the Customer Journey**

The next step is to examine the customer journey for opportunities to boost decision confidence.

Customers want to feel like they are in control throughout their end-to-end journey and do not want to be restricted to a channel (online or offline). They are turning toward hybrid experiences that enable them to engage with the channels that best support confidence in their purchase decisions. For example, 82% of smartphone users leverage their smartphones when shopping in stores.<sup>4</sup>



Hybrid experiences offer flexibility and allow customers to choose the most convenient or effective way to interact based on their immediate needs and location. This could mean providing a mobile app for wayfinding in a large store, blending the physical location with digital guidance or offering a virtual try-on tool online that lets customers easily order physical samples.

Formulate your approach to designing customer experience enhancements by answering the following questions in sequence:

- How do customers' needs present themselves at different stages in the journey?
- When would customers benefit from signals that clarify how to reach their goal? Alternatively, when would they benefit from signals that provide confidence in their decisions?
- What are the potential ways in which we could support the answer agreed upon in the second question?

Identifying the journey stage gives you a reference point for when this need shows up in your customer relationship. The delineation between clarity and confidence will help you

focus ideation efforts on designing a customer experience approach that supports that specific need. The inputs from the experience thesis statement, provided in Table 1, serve as a guiding reference to ensure the answers align with your target persona's needs and success criteria.

Treat this as an evergreen process and update the answers as you learn from your target customers. This exercise's value comes from planning for how your team can be better informed and equipped to engage your customers over the long term, as it does not restrict your strategy to a channel that could become irrelevant in the near future.

### Step 3: Prioritize Channel Selection Based on Customer Impact and Capability

Consider the channels for delivery only after your team has identified the stage and approach for supporting the customer.

Brands should think of channels as vehicles for customer experience delivery: a means, not an end.

Use the following factors, in concert with existing criteria at your organization, to identify which channels are the most viable for your company's experience delivery:

- **Feasible:** Are we currently equipped to deliver on the experience as promised?
- **Repurpose:** Is this an opportunity to leverage an existing capability or channel in a new way?
- **Measurable:** Can we assign metrics that track value for the customer and the company to our efforts?
- **Employee effort:** Will this require a completely new workflow or skill?
- **Time:** Can we deliver when our customers expect the experience to occur?
- **Customer experience ROI:** What are the potential gains and costs of execution, and/or what is the cost of not executing?

Some of the factors represent more advanced considerations that organizations often overlook, such as time and employee effort. Others are ways to reframe traditional criteria in a slightly different way, such as feasibility and whether there is an opportunity to repurpose an existing channel in a new way. Maintaining a balance between customer-focused and company-focused criteria is the most important.

<sup>1</sup> **2024 Gartner Senior Executive Views of CMO Leadership Survey.** This survey was conducted to explore how chief marketing officers are perceived by key C-suite leaders (i.e., CEOs and CFOs), and what distinguishes effective CMOs under different behavioral and company circumstances. The survey was administered online from August through September 2024 and includes data from 125 senior executives in North America (n = 84) and Europe (n = 41). Respondents were CEOs and CFOs at organizations with at least \$50 million in annual revenue, with 36% coming from organizations with at least \$1 billion in annual revenue. Respondents came from a wide variety of industries, including manufacturing and natural resources (n = 21); banking and financial services (n = 6); retail (n = 8); healthcare (n = 23); consumer products (n = 17); pharmaceuticals, biotechnology and life sciences (n = 6); insurance (n = 2); technology products (n = 14); travel and hospitality (n = 8); IT and business services (n = 16); and media (n = 4). Disclaimer: The results of this survey do not represent global findings or the market as a whole, but reflect the sentiments of the respondents and companies surveyed.

<sup>2</sup> **2025 Gartner CMO Spend Survey.** This survey explored top-line marketing budgets with the goal of understanding how changing customer journeys, pressures from the C-suite and cost challenges affect marketing's spending priorities and channel effectiveness. Conducted online from January through March 2025, the research included 402 respondents from North America (n = 202), the United Kingdom (n = 97) and Europe (n = 103; including France,

Germany, Belgium, Denmark, Finland, Netherlands, Norway and Sweden). Participants were required to be involved in decisions related to setting or influencing marketing strategies/planning, aligning marketing budgets/resources, or leading cross-functional programs and strategies with marketing. Seventy-seven percent of the respondents represented organizations with annual revenue of \$1 billion or more. The respondents came from a diverse range of industries: manufacturing (n = 52), financial services (n = 50), insurance (n = 43), consumer products (n = 43), healthcare (n = 42), travel and hospitality (n = 37), IT and business services (n = 36), retail (n = 36), pharma (n = 32), and media (n = 31). Disclaimer: Results of this survey do not represent global findings or the market as a whole, but reflect the sentiments of the respondents and companies surveyed.

<sup>3</sup> **2024 Gartner Channel and Campaign Management Survey.** This survey aimed to understand how marketing organizations should organize internal resources to manage effective campaigns, efficient channels and impactful content. It was conducted online from the end of July through mid-September 2024. In total, 418 respondents were surveyed in their native languages across North America (n = 194) and Europe (n = 224). Qualifying organizations reported enterprisewide annual revenue for fiscal 2023 of at least \$100 million, with 80% of the respondents coming from organizations with \$1 billion or more in annual revenue. The respondents came from a variety of industries: financial services (n = 67), insurance (n = 32), manufacturing (n = 43), consumer products (n = 38), retail (n = 40), travel and hospitality (n = 37), healthcare (n = 33), pharmaceuticals (n = 21), media (n = 29), tech products (n = 40), and IT and business services (n = 38). All the respondents were required to be senior decision makers in the marketing function, where they held significant responsibilities in setting or influencing overall marketing strategy and planning. They were also required to be involved in decisions pertaining to managing multiple marketing campaigns and/or advertising channels, as well as creating, managing and executing digital marketing strategy. Disclaimer: The results of this survey do not represent global findings or the market as a whole, but reflect the sentiments of the respondents and companies surveyed.

<sup>4</sup> **2024 Gartner Consumer Values and Lifestyle Survey.** The purpose of this survey was to understand consumer lifestyles and motivations. The research was conducted online in two parts, from 30 July to 28 August 2024 among 6,174 respondents in the U.S. (n = 4,146), Canada (n = 1,012) and the U.K. (n = 1,016). The first part of the survey included screening, demographic, sentiment,

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<sup>5</sup> **2024 Gartner B2B Buyer Survey.** This survey was conducted to explore how B2B buyers learned about potential suppliers, what factors influenced their decision to purchase from a specific supplier and their perceptions of personalization. The survey was administered online from August through September 2024 and includes data from 632 B2B buyers from North America (n = 502) and Europe (n = 130). Respondents who qualified for this survey were required to be employed full time at an organization with a total revenue of at least \$250 million (or equivalent) and have participated in a significant B2B purchase decision. A "significant B2B purchase decision" was defined as a decision that required deliberation with at least one other person and the evaluation of more than one potential supplier or vendor. Purchases included in this survey were made in a variety of categories, including manufacturing (n = 144), IT and high tech (n = 140), healthcare (n = 138), financial services (n = 115), non-IT business services (n = 57), and other (n = 35). Disclaimer: The results of this survey do not represent global findings or the market as a whole, but reflect the sentiments of the respondents and companies surveyed.





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