

# CMO Quarterly

First Quarter 2025



Lead Marketing to  
**Excellence**  
in 2025



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# Letter From the Editor

In the first quarter of 2025, CMOs find themselves continuing to navigate a constantly shifting landscape, one characterized by economic and political uncertainty as well as continued — and rapid — technological advancements. All while contending with growing expectations to deliver on growth. Compounded, these factors make it increasingly complex to set a strong marketing strategy for 2025.

This issue of the Chief Marketing Officer aims to provide you with the tools and knowledge needed to navigate these complexities and deliver a marketing strategy that exceeds your organization's expectations.

We start with our CMO leadership vision, outlining three key priorities to deliver marketing excellence in 2025: Bridge marketing strategy and operations, lead marketing to deliver differentiation, and prioritize customer journey investments.

A strong focus on marketing excellence when setting strategy is imperative to reaching your organization's growth targets. Next, we provide some data on CMOs' top strategic priorities and challenges to meet them. This will help you benchmark against peers and consider where to refocus and recommit your efforts. We also include insight into setting an AI strategic roadmap to help CMOs identify capabilities beyond the short-term, easy-to-evaluate use cases. Doing this has the potential to open up new ways to engage customers and drive revenue, connecting marketing's contributions to enterprise objectives.

A pair of our annual trends articles focuses on our most interesting (and provocative) predictions about marketing and marketers, sourced from our experts and covering every aspect of the discipline. Use our marketing prediction research to push your own thinking and as jumping-off points for long-range or scenario-planning exercises. Meanwhile, our U.S. consumer and cultural top trends research digests and triangulates emerging shifts in consumer attitudes and behaviors. Every CMO should understand the trends impacting their functions and the audiences they seek to engage; these ideas should inform your current strategies.

Finally, we include a pair of articles that speak to how CMOs can set strategy to prove the value of marketing and get credit for marketing work. The first explores how using a long-term value story and increasing the variety and sophistication of metric types can better show marketing's value. The second, closing out our issue, gives advice on how to link marketing strategy to business value and impact through cross-functional alignment that cascades throughout the function with clear progress metrics.

This curated set of articles should help you set a strategy clearly geared toward driving enterprise growth and exceed rising expectations in 2025.

All the best, Anja Naski

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**Authors**

Amy Abatangle

Sharon Cantor Ceurvorst

Ross Cosner

Noam Dorros

Joseph Enever

Nicole Greene

Dan Gutter

Brad Jashinsky

Janine Kanters

Lizzy Foo Kune

Leah Leachman

Ian Livingston

Emma Mathison

Ewan McIntyre

Kate Muhl

Claudia Ratterman

Chris Ross

Don Scheibenreif

Suzanne Schwartz

Kassi Socha

Chad Storlie

Anna Maria Virzi

Emily Weiss

**Design**

Tim Brown

Caroline Holloway

Amanda King

**Writing and Editorial**

Kate Post

**Project Managers**

Lauren Abel

Lindsay Kumpf



# What to Know to Set 2025 Vision and Strategy

by Sharon Cantor Ceurvorst and Ewan McIntyre

CMOs face increasing pressure to deliver growth and support cross-functional work in a cost-constrained environment. The most successful CMOs will rise to exceed extraordinary expectations by understanding the forces that will impact marketing in the year ahead.

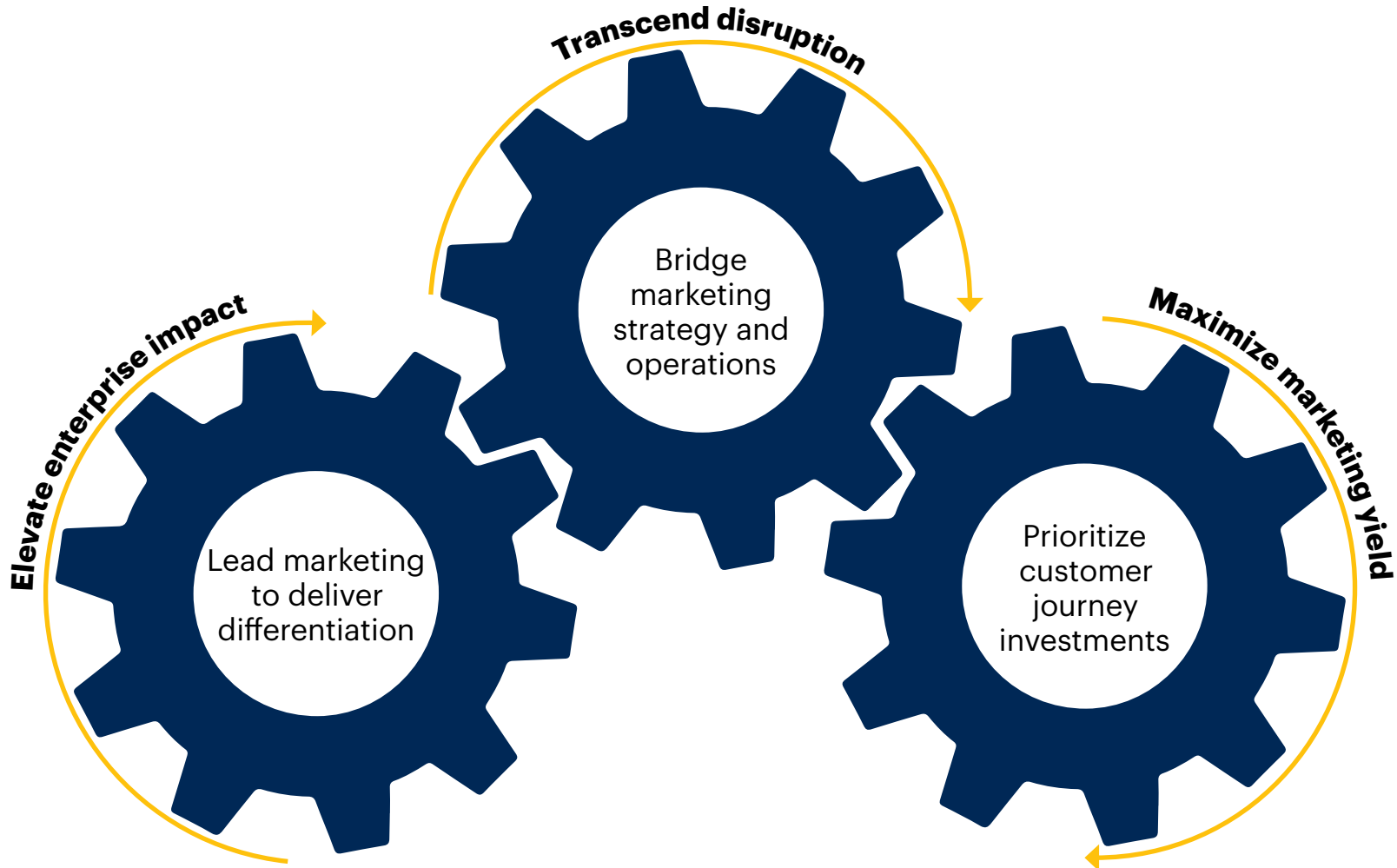


# Exceed Expectations by Focusing on Three Key Priorities

Despite years of disruption and budget constraints, marketers still face increasing pressure to deliver growth and support cross-functional work. In 2025, the most successful CMOs will rise to exceed extraordinary expectations in three ways (see Figure 1):

- Transcending disruption by bridging the gap between marketing strategy and operations
- Elevating enterprisewide impact by leading marketing to deliver differentiation
- Maximizing marketing's yield by prioritizing customer journey investments

» **Figure 1. Three Key Priorities to Deliver Marketing Excellence in 2025**  
Illustrative



Source: Gartner

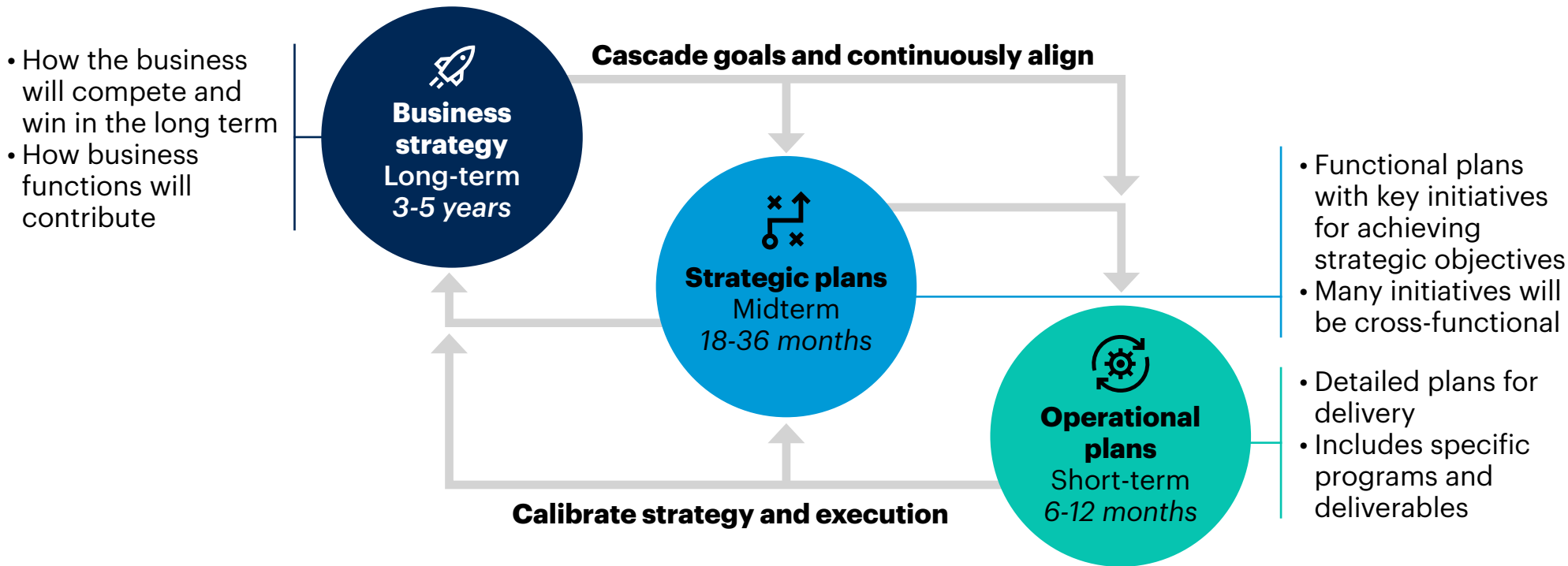
# Bridge Marketing Strategy and Operations

The amount and pace of enterprise change are pressuring marketing toward tactical thinking — dealing with immediate challenges and opportunities — which diminishes the function’s strategic impact. When marketing teams break the link between the tactics they’re using and the strategy they once laid out, the function loses its ability to meaningfully contribute to the enterprise’s growth and transformation goals.

This challenge is critical to address now because the very fabric of the enterprise is transforming amid disruptive changes in technology, as well as in the markets and societies where companies operate.

In the face of disruption and pressure to transform, CMOs must double down on what matters most: delivering the plan. The first step is to reassert the primacy of strategy, leveraging disruption as the argument *for*, rather than *against*, long-term planning. Even in a transforming environment, long-term strategy must inform midterm strategic plans and short-term operational plans (see Figure 2).

» Figure 2. Strategic Planning Cascade



Source: Gartner

In a recent survey, 84% of business leaders agreed that their company’s *identity* (e.g., mission, brand, culture) must completely or significantly change over the next five years in order to achieve its strategic goals.

2024 Gartner Marketing and Narrative Impact Survey<sup>1</sup>



The key to making strategy work amid disruption is continual alignment within and beyond the marketing function. Translating business outcomes into objectives and near-term results requires the ongoing calibration of strategy and execution.

**Dedicate Resources to Planning in the Short and Long Term**

Minimizing the gap between strategy and operations is not a simple change in the planning process or culture, but rather a discrete and targeted investment. The missing building block: dedicated resources for ongoing strategy management (see Figure 3).

Targeted investments can be challenging in resource-constrained times. But the core components of a strategy management capability are already present in many marketing organizations. It’s a matter of empowering existing resources with a defined scope and mandate: Give them the authority to direct operations and use delivery against goals as a guide to what does, and does not, get done. These resources include:

- **Staff:** This could be a chief of staff, marketing operations leader or marketing strategist role or team. Depending on your current structure, it could represent an adjustment to an existing role scope or time allocation to support the CMO and marketing leaders.
- **Methods:** This includes implementing clear performance goals and approaches such as objectives and key results (OKRs) to convert enterprise objectives and priorities into concrete, measurable operational results.
- **Support:** This means upskilling and empowering your teams, including external research resources that will help them build robust strategy management chops.
- **Tools:** These include the work management and project management platforms that many of you already have in your tech stack. Some teams also invest in specialized strategy management software (e.g., Workboard, Cascade Strategy, ClearPoint Strategy) that helps build strategic alignment and track progress against the plan.

» **Figure 3. Investments to Fill in the Missing Piece of Ongoing Strategy Management**



Source: Gartner

Lead Marketing to Deliver Differentiation

Even with an optimized strategic plan, many CMOs falter in exercising enterprise leadership. They face a fundamental perception challenge: Their most critical internal stakeholders, the CEO and CFO, simply don't see them as growth leaders.

**Differentiation** means creating a meaningful distinction between choices available to customers. It changes audience perceptions of what is valuable or even possible to achieve and leads back to what your company does uniquely well. This is the essence of marketing's *distinctive* contribution to growth.

According to CEOs and CFOs, only 14% of CMOs are effective at "market shaping" (i.e. the collection of behaviors geared to influencing market dynamics by identifying and fulfilling unmet customer needs). Companies where CMOs are effective at market shaping are **2.6 times more likely to exceed revenue and profit goals.**<sup>2</sup>

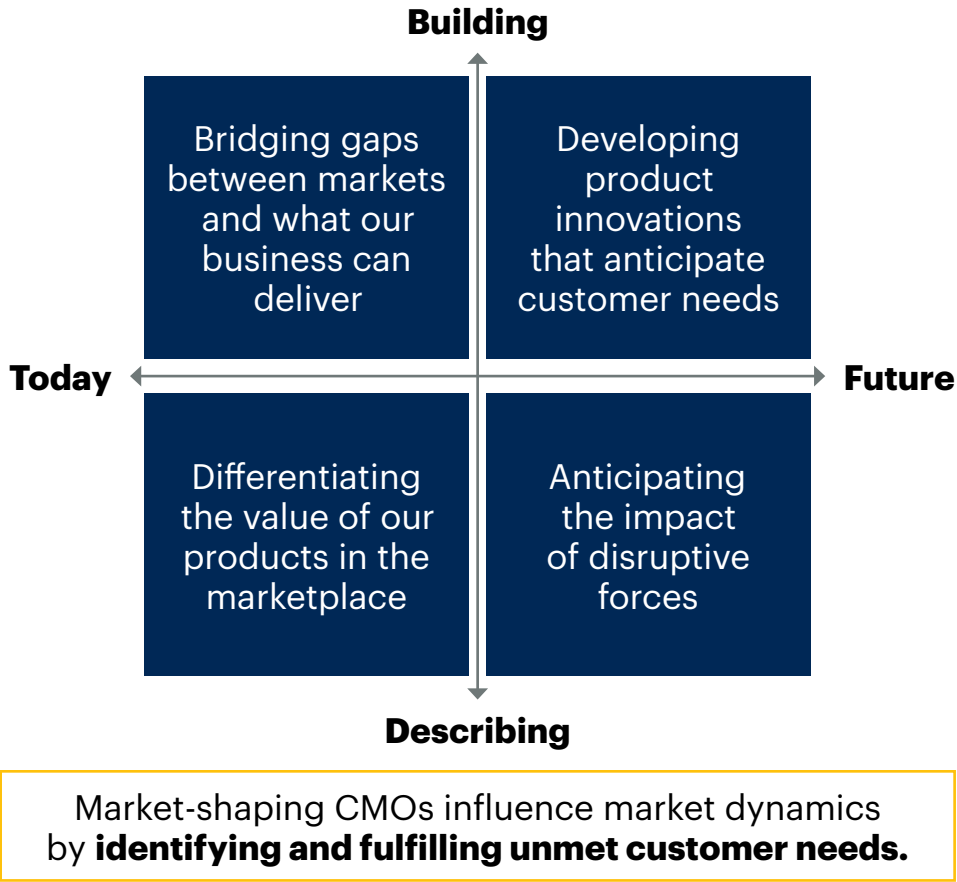
To deliver differentiation and sustained success, CMOs must prioritize the four key market-shaping behaviors. These behaviors involve *building things*, such as by influencing product innovations and how they map to customers' needs. They also involve *describing things* by articulating the unique benefits of offerings and anticipating disruptive forces. CMOs need to be able to *build* and *describe*, both today and in the future (see Figure 4).

In the eyes of CEOs and CFOs, market-shaping CMOs distinguish themselves from C-suite colleagues with their exceptional skill level in three areas:

- Data-based decision making
- Strategy management
- Market knowledge

These skills help CMOs make meaning from data and convert trends to visionary strategies. Critically, this is a different skill set than understanding or empathizing with the customer. With customer data increasingly available to all functions, the CMO edge lies in knowing how to synthesize insight from an array of different sources to find opportunities for differentiation.

» Figure 4. Four Key Areas Where Market-Shaping CMOs Excel  
CMO actions



Source: Gartner



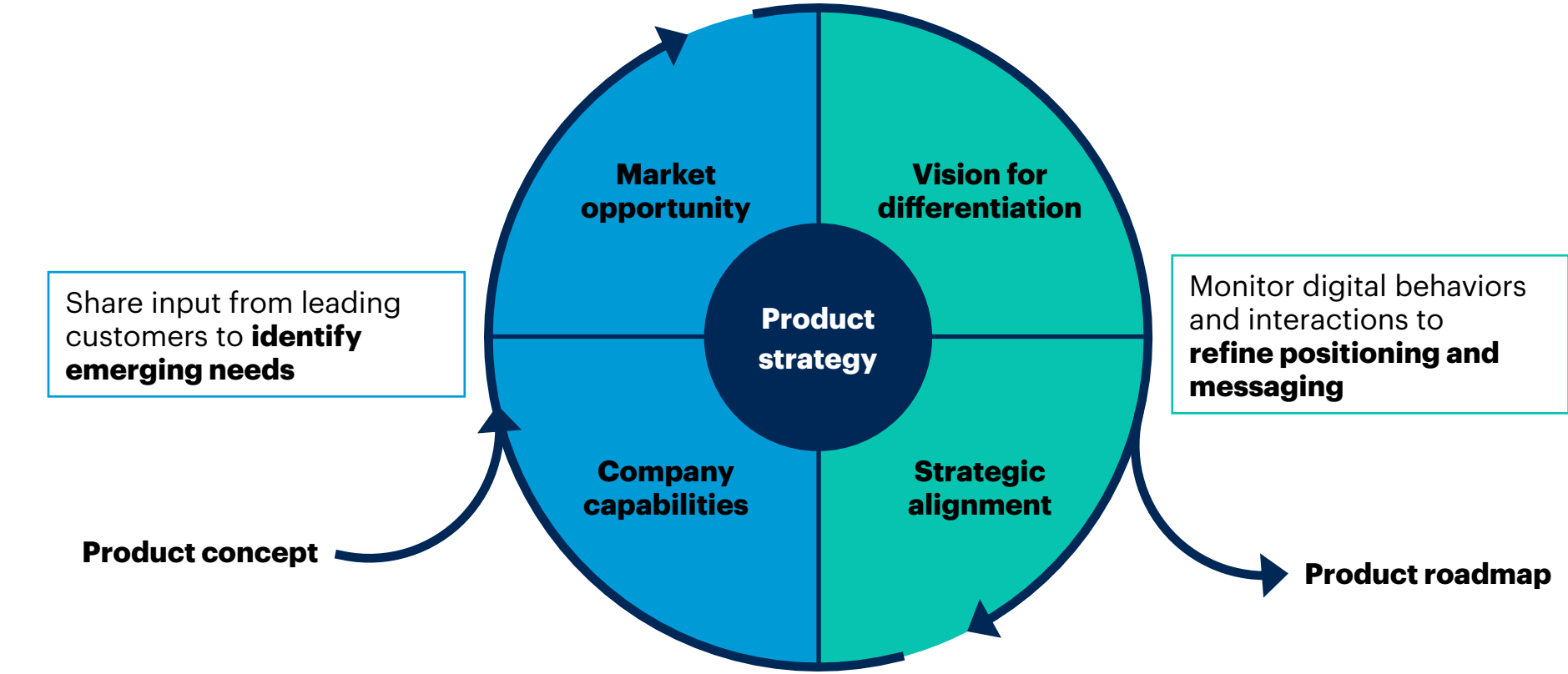
**Infuse Brand and Customer Insights into Business Decisions**

To become a market-shaping CMO, learn from how successful CMOs lead their functions. Market-shaping CMOs apply their strategic vision to specific areas of accountability. Compared to other CMOs, market shapers have accountability for between one and two additional areas beyond brand strategy.<sup>2</sup> This represents a selective extension of the CMO role into areas where marketing can have disproportionate impact.

Product strategy is one area where many CMOs should expand their business impact. Market positioning and differentiation are inextricably linked to both brand strategy and product strategy; each should inform the other. By building closer relationships with product innovation leaders, you can use brand and customer insights to inflect one of the most consequential processes in the enterprise (see Figure 5).

Early in the product lifecycle, share input from leading customers to shape product concepts. These insights help product innovation leaders identify emerging needs and clarify the fit between company capabilities and market opportunity.

» Figure 5. Ways to Use Customer and Market Insights to Infect Product Strategy



Source: Gartner

The most important question isn't "How do we capture more data?" but rather, "How do we apply the data and insight we have at a higher altitude of strategy and decision making?" This is the difference between a CMO who is shaped by the market and a CMO who is a market shaper.

## Prioritize Customer Journey Investments

With customer understanding being a significant driver of marketing-led growth, CMOs should be concerned that many customers currently feel misunderstood by brands. In a recent survey, 58% of U.S. consumers reported that the companies trying to sell them something don't have a good understanding of their needs and preferences.<sup>3</sup> The consequence is that many marketing campaigns underperform; in fact, 55% of marketing leaders report that their campaigns sometimes, often or always fail to drive enough sales to justify the investment.<sup>4</sup>

What's perplexing about this is that marketing has never had more access to data and technology for building customer understanding and targeting messages. Right now, technology-driven customer engagement is at an inflection point with accelerating AI initiatives.

Effective prioritization requires analyzing your martech strategy and your omnichannel marketing strategy. Focus on the three most important customer journeys (those with the largest impact on your strategic goals) to help you assess the degree of change required moving forward. How well are you supporting your customers in completing them? Is your martech stack underutilized, or are you missing technology that would aid these three customer journeys?

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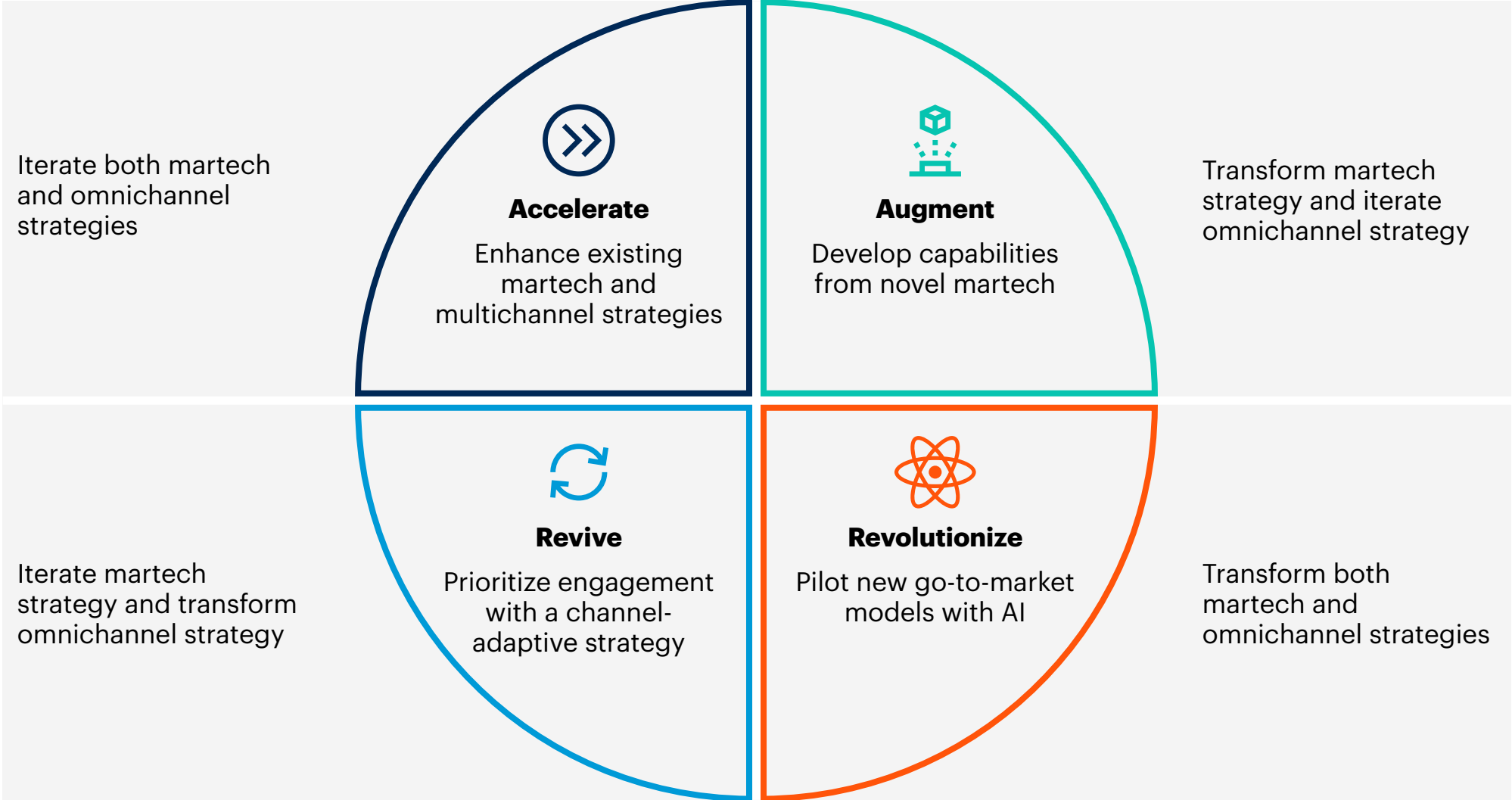
In 2025, CMOs must avoid the pitfalls of AI-driven excess and prioritize customer journey investments with the greatest economic return.

Answering these questions will determine whether iteration or transformation is necessary for each strategy to achieve business objectives (see Figure 6).

You will find yourself pointed in one of four directions, which will determine where to prioritize efforts.

- **Accelerate:** Customers, channels and technologies are well-aligned. Scale up results through a program of iterative improvements.
- **Augment:** A new tech strategy offers productivity benefits in pursuing a well-developed channel strategy, helping marketers execute best practices and drive speed to market.
- **Revolutionize:** Gaps exist in both martech and omnichannel strategies, and radical change is needed. AI offers the opportunity to completely reinvent the customer experience, but only if you have the resources and organizational will to do so. Invest in martech transformation and drive adoption of a high-cadence, adaptive channel strategy.
- **Revive:** Customer journeys are misaligned with desired results, but existing tech can accommodate a change in strategy. Focus on rebuilding customer journeys to better align with customer needs.

» Figure 6. Build Advantage Through a Holistic Martech and Omnichannel Analysis



Source: Gartner

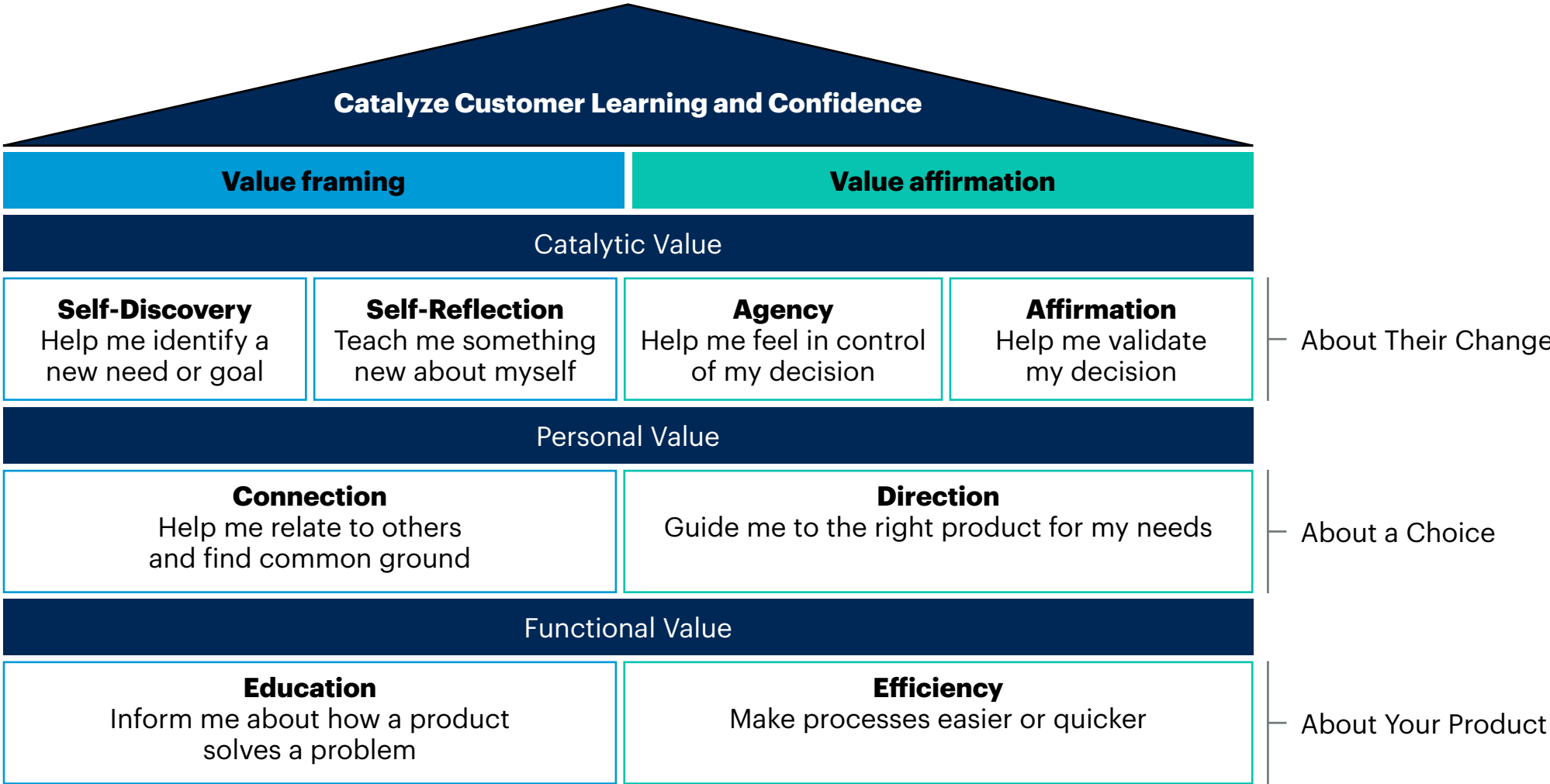
Audit Touchpoints and Work Across Teams to Deliver Catalytic Value

Evaluating the degree of strategic change required is an important step toward profitable growth. However, a more refined process is also needed to prioritize specific customer journey investments. Focus your team’s efforts toward the *ultimate* goal of customer journey orchestration: to catalyze customer change.

Experiences in the customer journey provide catalytic value when they change customers’ understanding of their own needs and make them feel more confident moving in a new direction. Just *one* catalytic digital experience doubles the likelihood of commercially productive behaviors, such as paying a premium or referring other customers to the brand (see Figure 7).<sup>5</sup>

The best companies do not leave this to chance. Creating catalytic experiences requires a data- and hypothesis-led approach. Start by auditing your existing touchpoints to determine where your best opportunities are to add catalytic value. By prioritizing catalytic experiences, you will rebuild emotional connections with customers who are feeling misunderstood and drive a more productive growth engine.

» Figure 7. Forms of Commercially Productive Customer Value



Source: Gartner



<sup>1</sup> **2024 Gartner Marketing and Narrative Impact Survey.** This survey examined marketing strategies, activities and impacts related to corporate narratives and supporting resources. It was conducted online from November through December 2023. The 1,154 respondents were from the U.S. (n = 684), Canada (n = 236) and the U.K. (n = 234). All respondents reported: (1) awareness of their company’s corporate narrative (or equivalent resource); and (2) regularly communicating about their company’s identity and direction to internal or external audiences. Sixteen percent of respondents were senior leaders, and 84% were entry-level managers or individual contributors. Twenty percent of respondents worked in a marketing function, and 80% worked in other functions. Respondents came from a variety of industries, including insurance, nonhealth (n = 173), pharmaceuticals (n = 130), IT products and high tech (n = 123), business services (n = 119), manufacturing (n = 117), healthcare providers (n = 116), banking/investment services (n = 102), health insurance (n = 88), retail (n = 62), consumer products, (n = 51) and others (n = 73).

<sup>2</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).

<sup>3</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, 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>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> **2022 Gartner Digital Customer Engagement Survey.** This survey was conducted to explore consumers’ and B2B buyers’ experiences in interacting with brands using digital channels and their perceptions of the value of their interactions with brands. The research was conducted online from November through December 2022 among 1,076 consumers from North America (n = 717), Western Europe (n = 136) and Asia (n = 223) and among 509 B2B buyers from North America (n = 327), Western Europe (n = 78) and Asia (n = 104). Consumer respondents were required to have considered a purchase within the last month, used a brand’s digital information sources, and recalled a specific digital interaction with a focal brand. B2B buyer respondents were required to be involved in a significant purchase on behalf of their organization in the last six months, used a supplier’s digital information sources, and recalled a specific digital interaction with a focal supplier or department (n = 205). Forty-seven percent of B2B respondents came from organizations with \$2 billion USD in annual revenue. B2B respondents came from a wide variety of industries, including technology products (n = 78), financial services (n = 76), manufacturing and natural resources (n = 71), retail (n = 69), IT and business services (n = 41), construction (n = 30), healthcare (n = 24), wholesale (n = 19), transportation (n = 17), consumer products (n = 16), real estate (n = 11), government (n = 10), media (n = 10), pharmaceuticals (n = 10), travel and hospitality (n = 9), education provider (n = 7), agriculture (n = 3) and other (n = 8).

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.



# A toolkit for new chief marketing officers

Transitioning into a new CMO role? This is a critical period as executives have less time than ever to demonstrate their impact. New CMOs must assess marketing capabilities, evaluate stakeholder relationships, gain business insight and identify quick-win opportunities.

**Download the Gartner Toolkit for New To Role CMOs to get access to:**



The CMO's First 100 Days Checklist



Marketing Score Maturity Assessment and Prioritization Tool



2025 CMO Leadership Vision Report



Marketing Budget Benchmarks



Marketing Strategy Guide and Template

**Download this toolkit to accelerate your business impact.**



# CMO's Top Strategic Priorities

by Janine Kanters and Sharon Cantor Ceurvorst

CMOs are prioritizing growth for 2025, but they must overcome rising costs, budget constraints and short-term execution pressures to do so. Use this research to get foresight into the most urgent questions and pressing challenges CMOs face, and some first steps you can take to address them.





CMO Priorities: Revenue Growth and Brand Building

We asked more than 200 senior marketing leaders to tell us their mission-critical priorities across the next 12 through 18 months, and one priority stood out above the rest. In 2025, CMOs will be looking for ways to drive their organizations’ revenue growth (see Table 1).

Although revenue growth has historically been a high priority for marketers, top-down pressures make it increasingly urgent. Sixty-two percent of CEOs named growth in their top three strategic priorities for 2024 through 2025, the highest it’s been ranked since 2014.<sup>1</sup> Compounding this urgency is the fact that, despite growth mandates, CMOs faced budget cuts in 2024; only 24% of them say they have sufficient budget to execute their strategy.<sup>2</sup>

The data also shows that brand awareness and differentiation is a mission-critical priority for CMOs, likely because these are also viewed as integral to achieving growth goals.<sup>3</sup> This is represented across the business as well, where 84% of cross-functional leaders agree that their company’s identity and direction must completely or significantly change to achieve their five-year strategic goals.<sup>4</sup>

Multiple compounding disruptions — including an increasingly competitive market, economic volatility, technological disruptions and shifting business strategies — are pushing organizations to evolve and/or resituate their brand(s) in the market. In turn, these pressures explain why business strategy and impact appears alongside growth and differentiation as a CMO mission-critical priority.

» Table 1. CMOs’ Mission-Critical Priorities Across the Next 12 Through 18 Months

	Priority, by rank	Summarized CMO responses
Tied	1 Revenue growth	<ul style="list-style-type: none"><li>• Identifying marketing initiatives that drive growth</li><li>• Driving growth across full customer life cycle</li></ul>
	2 Brand awareness and differentiation	<ul style="list-style-type: none"><li>• Raising brand awareness or shifting perceptions</li><li>• Repositioning to enhance market differentiation</li></ul>
	3 Business strategy and impact	<ul style="list-style-type: none"><li>• Developing long-term strategies</li><li>• Proving marketing’s impact</li></ul>
	4 Product marketing, innovation	<ul style="list-style-type: none"><li>• Launching products or entering new markets</li><li>• Innovating product offerings</li></ul>
	4 Marketing technology, AI	<ul style="list-style-type: none"><li>• Rebuilding or refining martech infrastructure</li><li>• Enabling usage of AI and tech capabilities</li></ul>

Source: 2024 Gartner Marketing Future Strategic Priorities Poll

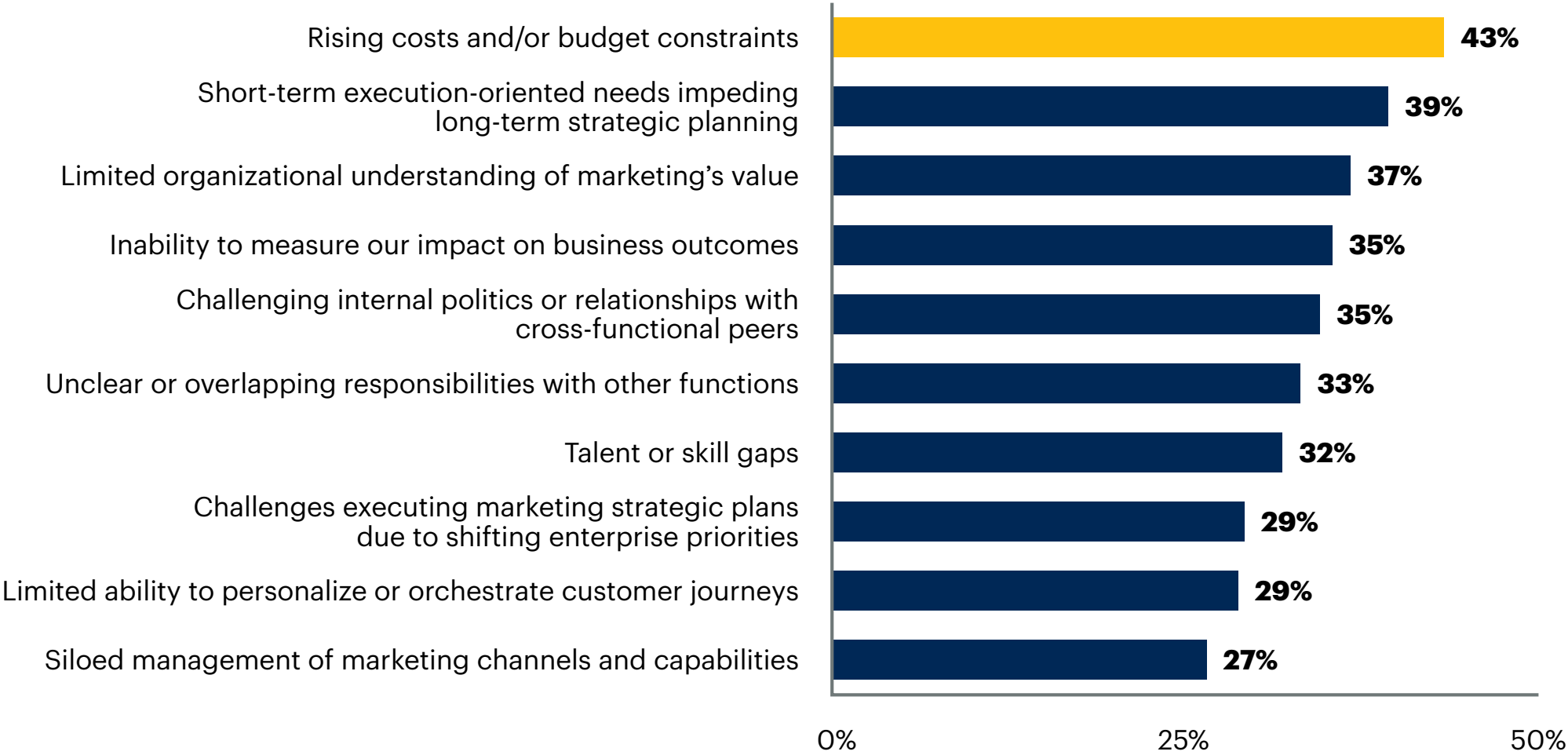


# CMO Challenges Center on Budgets, Balancing Goals and Battling Misperceptions

We also asked senior marketing leaders what challenges would get in the way of decision making and progressing toward departmental strategic objectives. With the year-over-year trend of declining marketing budgets unlikely to change in 2025, CMOs ranked “rising costs and/or budget constraints” as their most pressing challenge in 2025 (see Figure 1). This has been an ongoing struggle for marketers, with budgetary challenges also ranking high last year.<sup>5</sup>

CMOs also struggle to balance short- and long-term goals. Budgetary pressures compound the second-highest CMO challenge of balancing short- and long-term growth plays with limited resources. Compounding disruptions further exacerbate these concerns, forcing marketing leaders to continually adapt strategies and making it difficult to focus on longer-term goals.

» Figure 1. Marketing Leaders’ Most Pressing Challenges for 2025



n = 226 marketing leaders  
Q. Which of the following challenges get in the way of decision making and progress toward your department’s strategic objectives?  
Please select up to 5 of your most pressing challenges from the list below.  
Source: 2024 Gartner Marketing Future Strategic Priorities Poll

Similarly, strategy recalibrations require operational follow-through, such as changes to processes, roles and/or responsibilities. In a state of constant adaptation, it can be difficult to build momentum for changes and prevent employee burnout. Continuous shifts in priorities can contribute to resource waste and underutilization of technology investments, presenting an acute, ongoing challenge to balancing short- and long-term goals.

Budgetary pressures and balancing short- and long-term goals are also likely intertwined with marketing leaders' third most important challenge: battling limited organizational understanding of marketing's value.<sup>3</sup> Lack of understanding may be a driver behind declining budgets and conflicting internal perceptions of marketing value.

While moving the internal perception of marketing from a cost center to a revenue generator or profit driver is

a challenge we've heard about from CMOs for many years, it's a challenge they've only had limited success in tackling. Only 52% of senior marketing leaders say they can prove and get credit for marketing contributions, and CEOs and CFOs remain highly skeptical of marketing's contributions.<sup>6</sup> It's no surprise that "inability to measure our impact on business outcomes" is marketing leaders' fourth most important challenge.

**CMOs' Top Questions Focus on How to Drive Growth and Measure Impact**

We also asked senior marketing leaders to rank up to five top questions that are most urgent for the success of their departments in the next 12 through 18 months. Given their highlighted challenges, it is unsurprising that CMOs want answers to questions centered around growth and proving marketing's value (see Figure 2).

» **Figure 2. Marketing Leaders' Most Urgent Questions for 2025**



n = 217 marketing leaders  
Q. Please rank up to 5 top questions that are most urgent for the success of your department in the next 12-18 months.  
Source: 2024 Gartner Marketing Future Strategic Priorities Poll

CMOs are looking to identify marketing initiatives most likely to drive growth, as well as doubling down on driving growth specifically through better customer experiences.

<sup>1</sup> **2024 Gartner CEO and Senior Business Executive Survey.** This survey was conducted to examine CEO and senior business executive views on current business issues, as well as some areas of technology agenda impact. The survey was conducted from July 2023 through December 2023, with questions about the period from 2023 through 2025. One-quarter of the survey sample was collected in July 2023, and three-quarters was collected from October through December 2023. In total, 416 actively employed CEOs and other senior executive business leaders qualified and participated. The research was collected via 356 online surveys and 60 telephone interviews. The sample mix by role was CEOs (n = 282); CFOs (n = 81); COOs or other C-level executives (n = 32); and chairs, presidents or board directors (n = 21). The sample mix by location was North America (n = 175), Europe (n = 94), Asia/Pacific (n = 93), Latin America (n = 41), the Middle East (n = 8) and South Africa (n = 5). The sample mix by size was \$50 million to less than \$250 million (n = 77), \$250 million to less than \$1 billion (n = 101), \$1 billion to less than \$10 billion (n = 166) and \$10 billion or more (n = 71). 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 CMO Spend Survey.** This survey looked at top-line marketing budgets and aimed to identify how evolving customer journeys, C-suite pressures and cost challenges impact marketing's spending priorities and channel effectiveness. The research was conducted online from February through March 2024 among 395 respondents in North America (n = 200) and Europe (n = 195). Respondents were required to be involved in decisions pertaining to setting or influencing marketing strategy/planning and to aligning marketing budget/resources, and/or they were required to lead cross-functional programs and strategies with marketing. Seventy-four percent of the respondents came from organizations with \$1 billion or more in annual revenue. Respondents came from a variety of industries: financial services (n = 46), insurance (n = 35), manufacturing (n = 48), consumer products (n = 32), media (n = 35), retail (n = 38), healthcare (n = 47), pharma (n = 37), IT and business services (n = 41), and travel and hospitality (n = 36). 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 Marketing Future Strategic Priorities Poll.** This poll was conducted to explore the top priorities and most pressing challenges that marketing clients expect to face in 2025. The research was conducted online from May through June 2024 among 227 marketing leaders. Respondents included current or prospective Gartner clients from North America (n = 157) and Europe (n = 69). Respondents represented a wide range of industries, including banking, insurance and financial services (n = 45); manufacturing and natural resources (n = 40); healthcare (n = 23); IT and business services (n = 14); IT and high tech (n = 8); education providers (n = 6); transportation (n = 5); and others (n = 20). The question base varied because respondents were not required to answer all questions. 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 Marketing and Narrative Impact Survey.** This survey examined marketing strategies, activities and impacts related to corporate narratives and supporting resources. It was conducted online from November through December 2023. The 1,154 respondents were from the U.S. (n = 684), Canada (n = 236) and the U.K. (n = 234). All respondents reported: (1) awareness of their company's corporate narrative (or equivalent resource); and (2) regularly communicating about their company's identity and direction to internal or external audiences. Sixteen percent of respondents were senior leaders, and 84% were entry-level managers or individual contributors. Twenty percent of respondents worked in a marketing function, and 80% worked in other functions. Respondents came from a variety of industries, including insurance, nonhealth (n = 173), pharmaceuticals (n = 130), IT products and high tech (n = 123), business services (n = 119), manufacturing (n = 117), healthcare providers (n = 116), banking/investment services (n = 102), health insurance (n = 88), retail (n = 62), consumer products, (n = 51) and others (n = 73). 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>5</sup> **2023 Gartner Marketing Future Strategic Priorities Poll.** This poll was conducted to explore the top priorities and most pressing challenges that marketing clients expect to face in 2024. The research was conducted online from May through July 2023 among 70 marketing leaders. Respondents included current or prospective Gartner clients from the U.S. (n = 56), Europe (n = 5), the U.K. (n = 3), Canada (n = 1) and Asia/Pacific (n = 1). Respondents represented a wide range of industries, including banking, insurance and financial services (n = 13), consumer products (n = 9), manufacturing and

natural resources (n = 7), IT and business services (n = 6), pharmaceuticals, biotechnology and life sciences (n = 6), education providers (n = 3), healthcare (n = 3), IT and high tech (n = 2), and others (n = 17). Note: Question base varies as respondents were not required to answer all questions.

<sup>6</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% 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). 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.

# How to Improve Marketing Strategy Development for Successful Execution

by Amy Abatangle

CMOs struggle to link marketing strategies to business value and impact. As enterprises seek to transform, CMOs must gain and sustain cross-functional alignment, cascade plans with clear progress metrics and adjust them based on strategy context and execution.





CMOs face uncertain futures: 84% of enterprises say they must change their strategic direction to achieve future growth and success.<sup>1</sup> Yet 72% of business leaders agree that marketing is not instrumental to business evolution.<sup>1</sup>

In fact, 55% of nonmarketing leaders feel marketing has an inflated view of its importance in cross-functional initiatives.<sup>2</sup>

CMOs must demonstrate marketing’s impact to meet the expectations of their CEOs and executive peers. If they cannot draw a direct line between marketing activities and business outcomes, CMOs lose credibility. Worse, they adopt a reactive posture, taking on more work to demonstrate impact through productivity.

To reassert marketing’s unique value in the enterprise, CMOs must develop and execute marketing strategies with clear business impact.

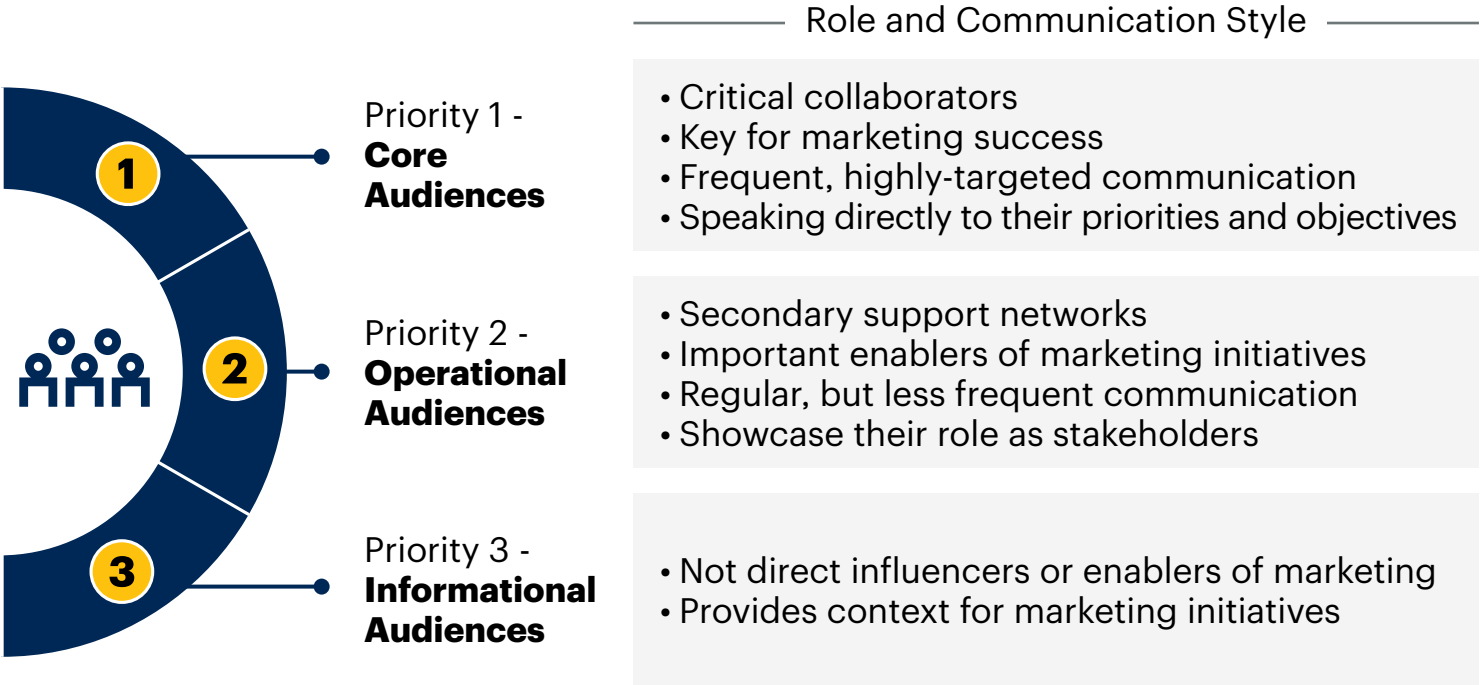
### Gain and Sustain Stakeholder Alignment on Critical Business Priorities

CMOs say aligning on shared goals is the most important activity for their function’s contributions to enterprisewide business objectives, yet **only 45%** were personally involved in goal alignment over the past 12 months.<sup>2</sup> Executive alignment is critical for delivering on expectations and hitting goals. Follow five steps to agree on core priorities.

#### 1. Identify and Segment Stakeholders

Begin your stakeholder management efforts by grouping stakeholders into three audiences based on priority, as shown in Figure 1.

» Figure 1. Internal Audience Prioritization



Source: Gartner

**Your CEO and the executive peers** are your core audience and are critical collaborators for marketing success. Speak directly to their priorities and objectives. This group could include sales leaders, general managers, product leaders or others.

**Your operational audience** includes the network of decision makers who directly affect your plans' implementation. This could include finance, IT and others. Focus on their roles as stakeholders in marketing strategy and key initiatives. Consistently gauge their level of understanding, accountability and buy-in.

**Your informational audience** is the group of individuals without direct influence on marketing initiatives. This might include R&D, supply chain or other functions. Think carefully about this group. They may influence your executive or operational stakeholders. Keep them informed proactively so that they don't insert themselves at inopportune moments, potentially as detractors or inhibitors who could derail your initiatives.

## 2. Interview Key Stakeholders

Start by asking the right questions about expectations of marketing. Focus on three areas:

- **Objectives** — Understand what is important to stakeholders, now and in the future. What are their goals? How is their performance measured? Focus on how marketing can create value by supporting these objectives.
- **Dependencies** — Ask about marketing capabilities and expectations. Verify their understanding of what your function can and cannot do.
- **Perceptions** — Finally, learn about their perception of marketing and how it creates value in the enterprise. Level set on the ways that marketing has or has not met their needs.

You should have a cadence of relationship-building meetings with your core and operational audiences quarterly or, at minimum, twice a year to head off any perception problems and provide visibility into where expectations and collaboration may be breaking down. Plan to keep your informational audiences up-to-date on marketing strategy and key initiatives to ensure their understanding of marketing's value. This can be done with one-to-many communications rather than one-on-one meetings.

## 3. Agree on Business Priorities

Your stakeholder interviews should help you develop your relationships with key collaborators and identify critical business priorities. You should be able to answer yes to:

- Do we have clear strategic priorities from the business?
- Are business goals specific, including strategy hypotheses, success factors and potential challenges?
- Have we aligned on no more than five business priorities?

This will necessitate trade-offs. Focus your efforts on agreeing to the mission-critical priorities that most marketing resources and activities should support. You can also determine business priorities as part of existing strategic planning processes, but this does not replace the need for regular relationship-building meetings.

## 4. Validate Marketing's Role

Marketing often acts as a connector between functions in the enterprise. However, marketing's involvement may not always be needed or valued. Test for this by asking yourself:

- What unique value does marketing bring to this activity or initiative?
- Will marketing get credit for supporting this?
- How will we demonstrate that?

Think critically about specific success measures that show marketing's impact. If they are absent, reconsider marketing's need for involvement.

### 5. Sustain Alignment

Gaining stakeholder alignment on critical priorities is a baseline for beginning strategic planning. However, this is not a one-and-done process. You need to sustain alignment for effective strategy execution by actively engaging and managing stakeholders on an ongoing basis. Sustained alignment will enable you to:

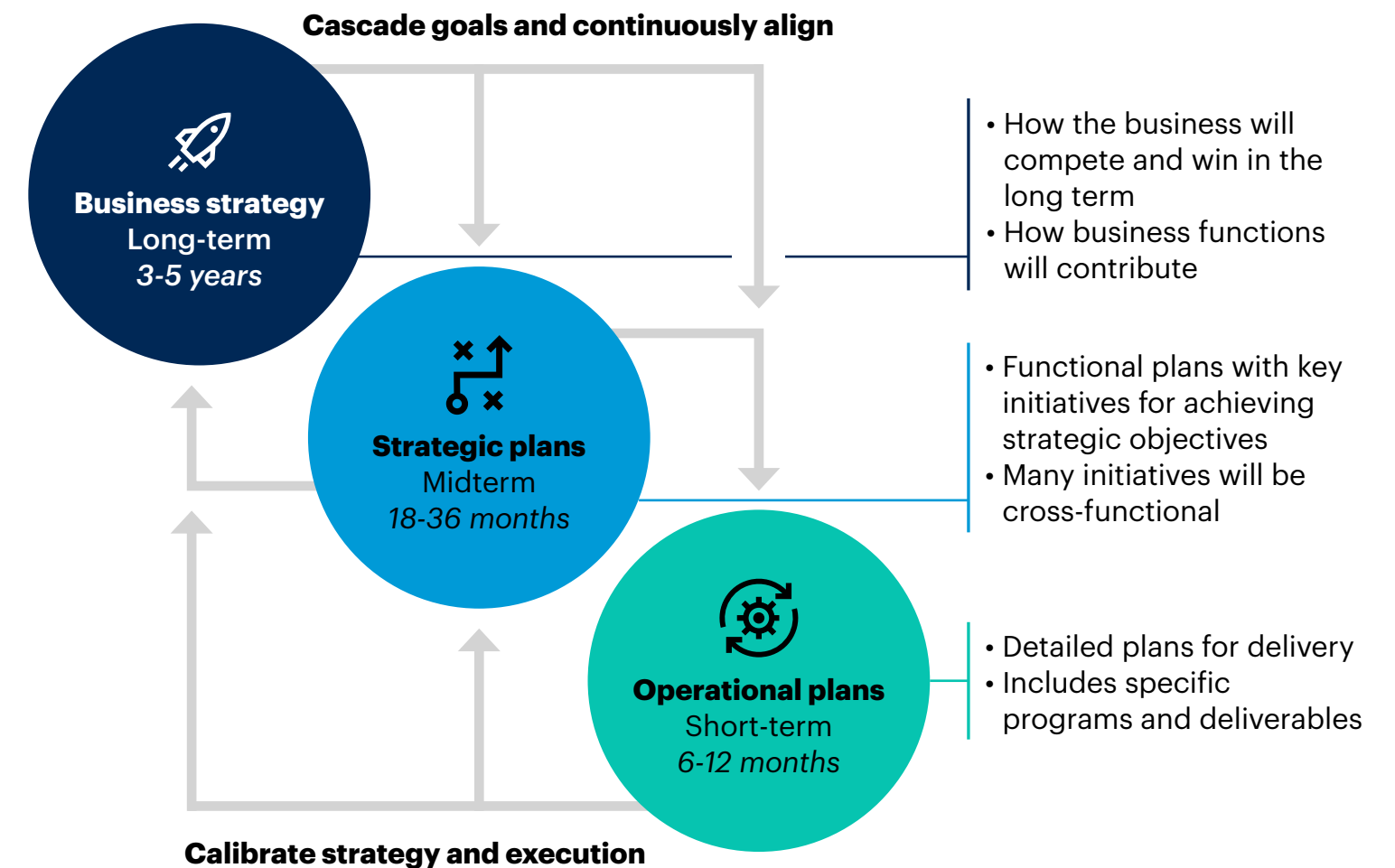
- Respond to changes in business strategy, stakeholder expectations and external business conditions.
- Proactively address any stakeholders who are withdrawing from their original commitments.

Bring stakeholders into marketing planning early and meet with them regularly to address needed changes that sustain the alignment critical for success.

### Develop and Cascade a Marketing Strategy With Clear Progress Measures

CMOs often conflate business strategy, strategic plans and operational plans. These are all distinct elements, each with its own time horizons, as shown in Figure 2. Business strategy sets the direction for the executive team to cascade goals and align functions that will be accountable for developing strategic and operational plans. Function leaders then provide ongoing feedback to adjust the strategy and its implementation.

» Figure 2. Strategic Planning Cascade



Source: Gartner

Your marketing strategy should focus on the long term and identify key actions you need to take to reach your objectives. For example, let’s look at a long-term, enterprise-level goal: Grow revenue 30% in three years (see Figure 3).

Imagine that through your executive alignment activities, you’ve determined that the best way to approach the revenue goal is through digital commerce. Your strategy, then, is to **drive top-line growth by building a preference for digital channels.**

Your strategic plans cover the midterm and consist of granular initiatives that support your strategy. Your strategic initiatives include setting a target for **increasing digital sales by 25% by year-end.** You need to drive more traffic to the site, so **doubling monthly site traffic within six months** is another strategic initiative. Your strategic plans are made up of initiatives that support your strategy and are specific, measurable and time-bound.

Finally, your operational plans consist of the projects, programs and products you will deliver in the near term to support your strategic initiatives. These are more concrete steps broken down into projects

or tasks, like **improving the customer effort score on check-out** or **increasing traffic driven by digital advertising.** These projects or tasks must have clear owners, deliverables and milestones.

Your strategic and operational plans have unequivocal progress measures to let you know if you are headed toward your goal of driving more online sales. They ladder up clearly to your strategy.

» Figure 3. Marketing Plans Must Ladder Up



Source: Gartner



# Monitor Strategic Context and Strategy Execution to Adjust and Pivot

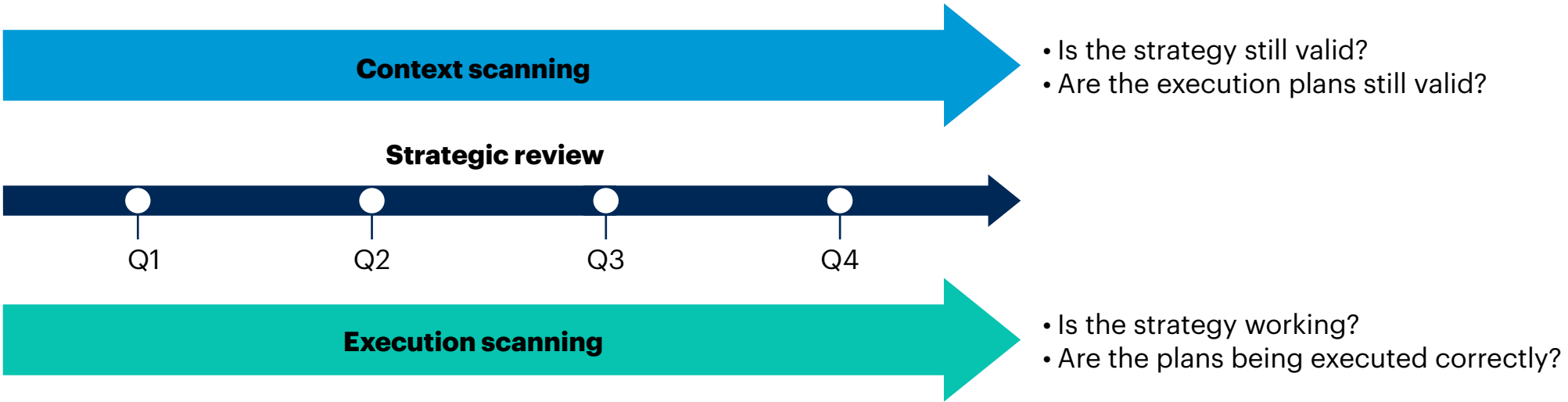
The 2023 Gartner Executive Leadership Team Dynamics Survey found a statistically significant difference between high-performing and low-performing teams when it comes to strategy execution.<sup>3</sup> In the survey, performance was measured across a range of criteria, including revenue generation, operating margins and customer experience. The high-performing teams rated their enterprises as effective at a higher rate than low-performing teams in each of these key disciplines:

- Regularly reviewing and, where necessary, adjusting strategy in response to new information or changes in business context
- Proactively addressing issues and risks impacting execution success
- Stopping or eliminating initiative execution to course-correct as needed
- Reviewing and reallocating funding to reflect changes in priorities, issues and progress<sup>3</sup>

Bring these best practices to your marketing strategic planning by regularly reviewing your plans and progress using the measures you have set. Include context scanning and execution scanning in your review process (see Figure 4).

- **Context scanning:** Evaluate the business context by looking primarily at external factors like changing buyer behavior or consumer sentiment, regulatory pressures or macroeconomic impacts. Ask: *Is the strategy still valid? Are our execution plans still valid?*
- **Execution scanning:** Evaluate your ability to execute your plans by looking inward at how you are putting your operational plans into action. Ask: *Are our plans delivering the expected impact? Are the plans being executed correctly, or are we running into unforeseen issues?*

» Figure 4. Review and Adjust Strategy Execution



Source: Gartner

Context Scanning

Context scanning validates that the strategy still makes sense for the business. Conduct context scanning by assessing these three elements:

- 1. **Strategic assumptions** built into the plan. Identify measurable and time-bound risks. For example, you assume that digital purchasing will continue to grow in your sector. If a risk materializes, adjust your plan accordingly.
- 2. **Strategic issues** that arise. These are trends that can act as inflection points. For example, if you see digital sales grow more than 20% per month for three months, you may want to accelerate some of your plans.
- 3. **Strategic triggers** that impact execution, such as a major digital competitor entering the market. This might necessitate plan acceleration, deceleration or another adjustment.

Execution Scanning

Context scanning helps validate the strategy and the plan. Execution scanning, by contrast, helps ensure the plan works. As you implement your operational plans, review your programs, products and projects. Ask:

- Did we do what we said we would?
- Did it produce the result we wanted?

- Did we run into problems with delivery, such as time, budget or quality?
- Did we have problems with the outcomes themselves and their scale, timeliness or impact?

For example, you may have improved check-out, but the project took too long and ran over budget with your agency. Or you drove more traffic, but it was low value and didn’t convert to sales.

You can ask the same questions regarding your strategic plans as you begin to reach milestones and complete strategic initiatives. Validate that your strategy is still working and that the plans are being executed correctly. Did you meet your strategic objectives? Ask:

- Are we seeing trend lines that make us believe we’ll be on target to deliver against our objectives?
- Are there internal issues that might make us miss our goals?

CMOs should review execution at least monthly to quickly identify and address execution issues that they can control or work across functions to remediate. Raise execution issues that are severe enough to warrant revisiting the overall strategy in quarterly strategy reviews with your executive peers.

<sup>1</sup> **2024 Gartner Marketing and Narrative Impact Survey.** This survey examined marketing strategies, activities and impacts related to corporate narratives and supporting resources. It was conducted online from November through December 2023. The 1,154 respondents were from the U.S. (n = 684), Canada (n = 236) and the U.K. (n = 234). All respondents reported: (1) awareness of their company’s corporate narrative (or equivalent resource); and (2) regularly communicating about their company’s identity and direction to internal or external audiences. Sixteen percent of respondents were senior leaders, and 84% were entry-level managers or individual contributors. Twenty percent of respondents worked in a marketing function, and 80% worked in other functions. Respondents came from a variety of industries, including insurance, nonhealth (n = 173), pharmaceuticals (n = 130), IT products and high tech (n = 123), business services (n = 119), manufacturing (n = 117), healthcare providers (n = 116), banking/investment services (n = 102), health insurance (n = 88), retail (n = 62), consumer products, (n = 51), and others (n = 73). 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> **2023 Gartner Marketing Cross-Functional Collaboration Survey.** This survey was administered in July and August 2023 and includes data from 329 marketing leaders and 78 leaders from other functions. These results represent leaders from the U.S. (n = 172), Canada (n = 41) and Europe (n = 194) who are involved in cross-functional initiatives at their organization. Respondents were required to be involved in executing at least one cross-functional initiative related to digital revenue growth, customer experience, customer data governance, business strategy planning, alignment of commercial functions or ways of working. Fifty-nine percent of the respondents came from organizations with over \$2 billion or equivalent annual revenue. Respondents came from a wide variety of industries, including healthcare (n = 85), financial services (n = 70), manufacturing and natural resources (n = 49), travel and hospitality (n = 37), IT and business services (n = 36), technology products (n = 36), retail (n = 35), consumer products (n = 33), and media (n = 30). Respondents answered questions about their experiences with cross-functional collaboration, including approaches and barriers to collaboration, as well as their perceptions of talent-related issues and organizational change. 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>3</sup> **2023 Gartner Executive Leadership Team Dynamics Survey.** This survey was conducted to discover how executive leadership dynamics affect business value from 5 May through 28 June 2023. Qualified respondents were CEOs or direct reports to a CEO and came from companies with at least \$1 billion in annual revenue. In all, 140 executive leadership team members from North America (n = 69), Europe (n = 41) and Asia (n = 30) participated. Disclaimer: Results of this survey do not represent global findings or the market as a whole, but reflect the sentiment of the respondents and companies surveyed.

# The Gartner Top U.S. Consumer and Cultural Trends for 2025

by Emma Mathison and Kate Muhl

Gartner's Top U.S. Consumer and Cultural Trends research captures the most important shifts in consumer behaviors and attitudes. CMOs should use these insights to improve audience targeting, creative execution, internal and external communications and scenario planning.



Gartner’s Top U.S. Consumer and Cultural Trends helps CMOs understand the context into which their efforts flow. CMOs should use these trends to better align their initiatives to key cultural trends and changes in consumer behaviors and attitudes. Trends represent synthesized insights gleaned from multiple modes of longitudinal quantitative, qualitative and observational research. Top trends are:

- Cross-category and cross-demographic shifts occurring in the consumer landscape
- Significant changes we expect to impact marketers’ planning, strategy and insight development in the year ahead
- Explored within an 18-month time horizon
- Emerging and growth trends, but not mature trends






Each trend is a change significant enough to consider for strategic business activities like scenario planning, audience targeting and even creative execution and communications.

The 2025 top trends, taken together, paint a vivid picture of consumer life — and brand challenges — in the postinflation era. Heading into 2025, consumers have enjoyed more than 17 consecutive months of real average earnings growth and more than a year of inflation well under 4%.<sup>1</sup> Yet U.S. consumers are more concerned about the increased cost of living<sup>2</sup> and more suspicious of big brands than ever.<sup>3</sup> This negativity is a cultural ripple effect from 2022’s generationally high rate of inflation. And it’s driving a wedge between consumers and brands, fueling a sense of general consumer powerlessness.

To build a successful strategy, CMOs must understand the true underlying forces to which consumers are reacting. This research is designed to provide that context. The 2025 top trends are (see Figure 1):

- Price paranoia
- Norming
- The new Spartans
- Embraceable automation
- The boomer boom

» Figure 1. Gartner Top U.S. Consumer and Cultural Trends for 2025

		Consumer values	Brand values
 <b>Price paranoia</b>	Prices aren’t just high for consumers — they’re unpredictable. Inflation may have eased, but suspicion and frustration have not.	<ul style="list-style-type: none"><li>• Trust</li><li>• Honesty</li></ul>	<ul style="list-style-type: none"><li>• Trust</li><li>• Value</li></ul>
 <b>Norming</b>	As consumers’ experience of the world gets ever more tuned to their individual behaviors and preferences, they’re seeking an objective take on their place in the larger whole.	<ul style="list-style-type: none"><li>• Comfort</li><li>• Simplicity</li></ul>	<ul style="list-style-type: none"><li>• Self-esteem</li><li>• Health</li></ul>
 <b>The new Spartans</b>	In the postinflation era, making do with less isn’t just a tactic; it’s a flex.	<ul style="list-style-type: none"><li>• Simplicity</li><li>• Self-actualization</li></ul>	<ul style="list-style-type: none"><li>• Ambition</li><li>• Practicality</li></ul>
 <b>Embraceable automation</b>	While GenAI dominates headlines and worries consumers, real-world interactive automation is quietly capturing the hearts and engagement of humans.	<ul style="list-style-type: none"><li>• Convenience</li><li>• Safety</li></ul>	<ul style="list-style-type: none"><li>• Convenience</li><li>• Curiosity</li></ul>
 <b>The boomer boom</b>	Baby boomers are (still) living their best lives, the reverberations of which are deepening culture divides and creating challenges for brands.	<ul style="list-style-type: none"><li>• Success</li><li>• Wisdom</li></ul>	<ul style="list-style-type: none"><li>• Trust</li><li>• Happiness</li></ul>

Source: Gartner  
Consumer values = core consumer drivers, ideals and aspirations;  
brand values = consumers’ preferred brand traits relevant to the trend



## Price Paranoia

Inflation drove prices up and sent consumers hunting for lower-priced alternatives. In the wake of inflation, prices still feel high, but also unpredictable as consumers encounter unexpected price changes and hidden fees. That fuels price paranoia and distrust, weighing down consumer loyalty and hardening the brand relationship into something that may feel adversarial to consumers. When asked whether they feel confident about what things are going to cost, 59% say they don't feel confident versus 41% who say they do.<sup>2</sup>

"I get angry. Do [brands] think I am not going to notice [their pricing ambiguity]? Then I decide to not buy the item."

**Rebecca**, baby boomer from AZ<sup>4</sup>

Consumers say they've encountered unexpected prices in many scenarios (see Figure 2), such as seeing a service bill increase even though usage did not. When confronted with an unexpected price increase, 78% of consumers took some action such as conducting additional research, delaying the purchase or seeking customer support.<sup>2</sup> Those who decided to pay the new price still felt frustrated.<sup>4</sup>

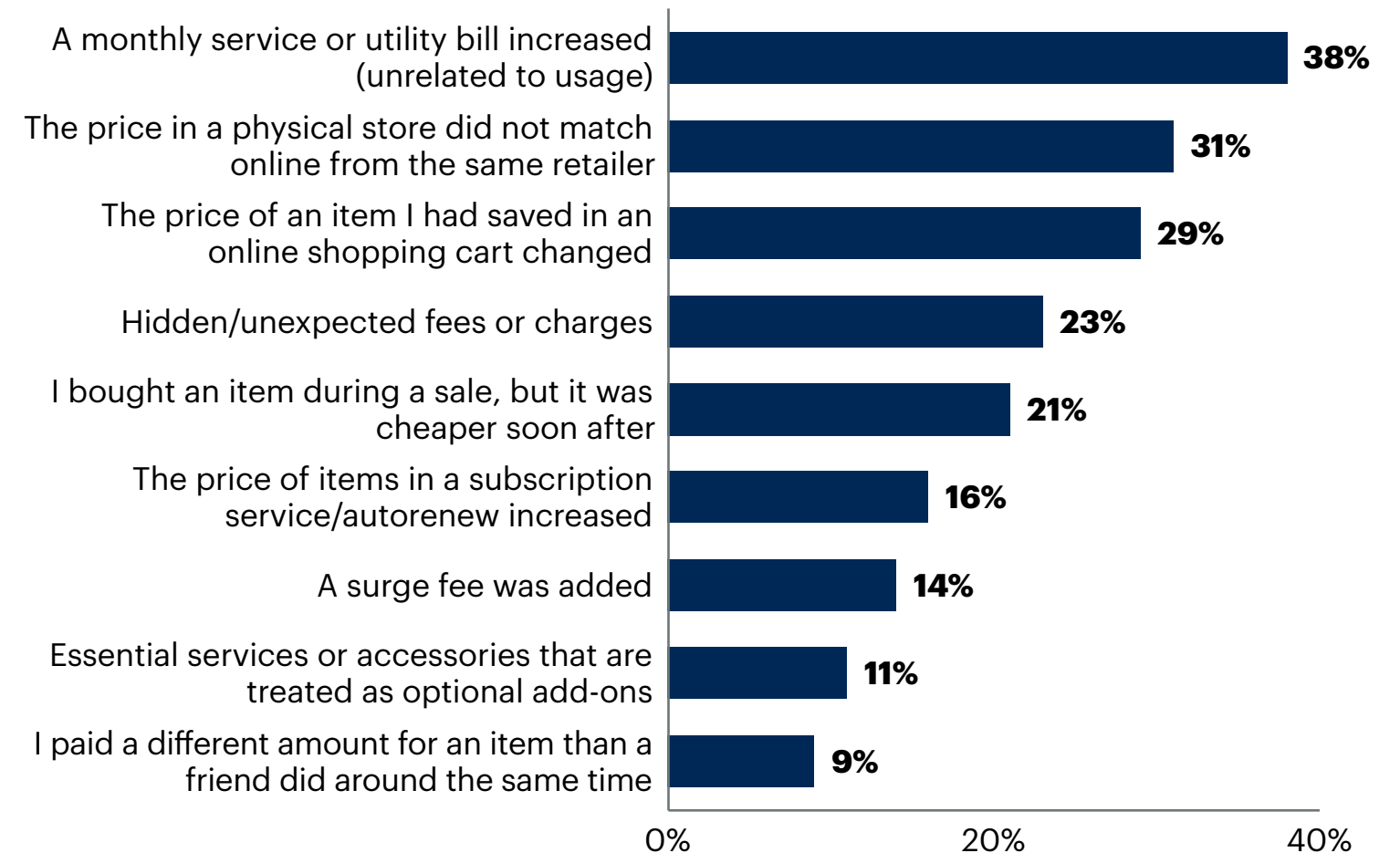
### Strategy Implications

Be the brand known for price stability, which can be a differentiator. If pricing is out of your team's purview, focus on promotions that will help consumers grab back some sense of pricing control.

Reciprocate customer loyalty through rewards programs. Support customer retention with price-stabilizing tools and perks for loyalty program members.

### » Figure 2. Types of Unpredictable Prices Consumers Encountered

Percentage of respondents



n = 1,532 U.S. consumers age 15+

Q. In the past year, have you encountered any situations where you were expecting to pay a certain amount for a product or service, but in the end, the total cost was different than you had prepared or anticipated paying? Please select all the scenarios that you have encountered in the past year.

Source: 2024 Gartner Cultural Attitudes and Behavior Survey

Note: "Other" and "I haven't experienced any of these" are not shown.

## Norming

Much of consumers' experience — media, shopping and beyond — is shaped by their data trails. Norming is a consumer counterweight to the hyperpersonalized worldview imposed by algorithms. Consumers turn to crowdsourcing through online communities, search tools and quizzes to address burning questions about who they are, how they compare, and who else is “like them.” Most U.S. consumers (82%) reported they did at least one “norming” activity (see Figure 3). The most common type was financial-status-related norming, such as comparing home values on realty sites and viewing online content where people share/discuss their about budgeting or finances.<sup>2</sup>

"[I'm] not always sure about some things. [It's] nice to see what someone else may think and then compare it to how I think."

**Debbie**, Gen Xer from AK<sup>5</sup>

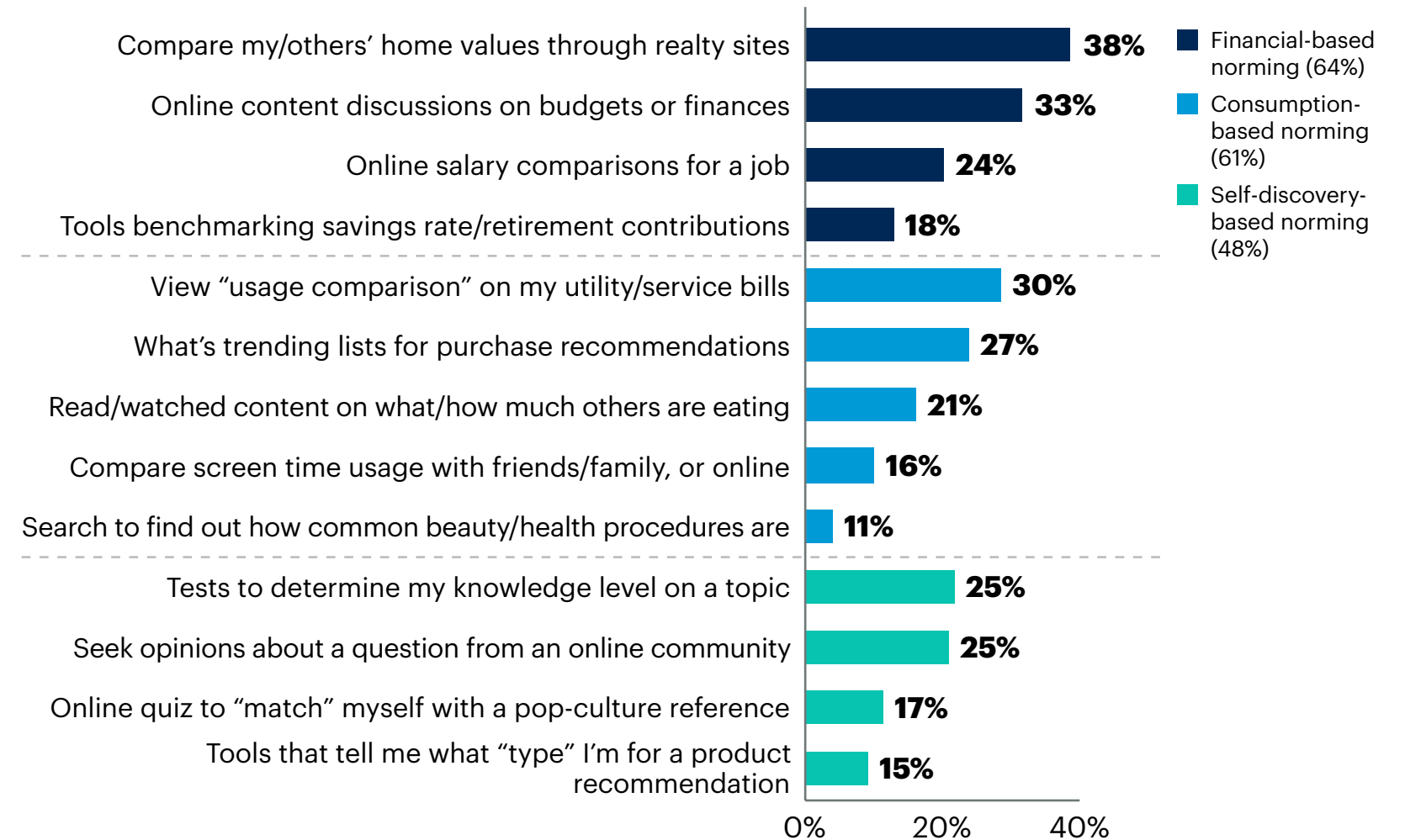
### Strategy Implications

Resist the temptation to double down on interactive decision tools for product recommendations. While these tools serve an effective purpose in the shopping journey, by design, they articulate individualized consumer needs. These tool results may be read as inauthentic or lacking in objectivity.

Help consumers understand themselves in context by offering them insight that doesn't necessarily lead directly to a product decision. Norming shows us that consumers value context for its own sake and seek ways to address their burning questions about who they are, how they compare and who else is “like them.”

### » Figure 3. Ways Consumers Approach Norming

Percentage of respondents



n = 1,532 U.S. consumers age 15+

Q. Which of the following, if any, have you done in the past year?

Source: 2024 Gartner Cultural Attitudes and Behaviors Survey

Note: “None of the above” not shown.

## The New Spartans

Consumers take conscious steps to decrease consumption and become more conscientious about wasteful buying habits. For the new Spartans, embracing austerity is a way to reclaim agency and control after years of inflation-driven thrift. While monetary reasons are at play, 68% of consumers cite intrinsic or self-improvement motivations for reducing consumption.<sup>2</sup>

Consumers' top reasons for reducing consumption:

- Things are too expensive
- To declutter/simplify my life
- To feel better about myself
- Environmental reasons
- To prove to myself that I can

Eighty-eight percent of consumers cite at least one way in which they are reducing consumption, such as using products longer<sup>2</sup> (see Figure 4).

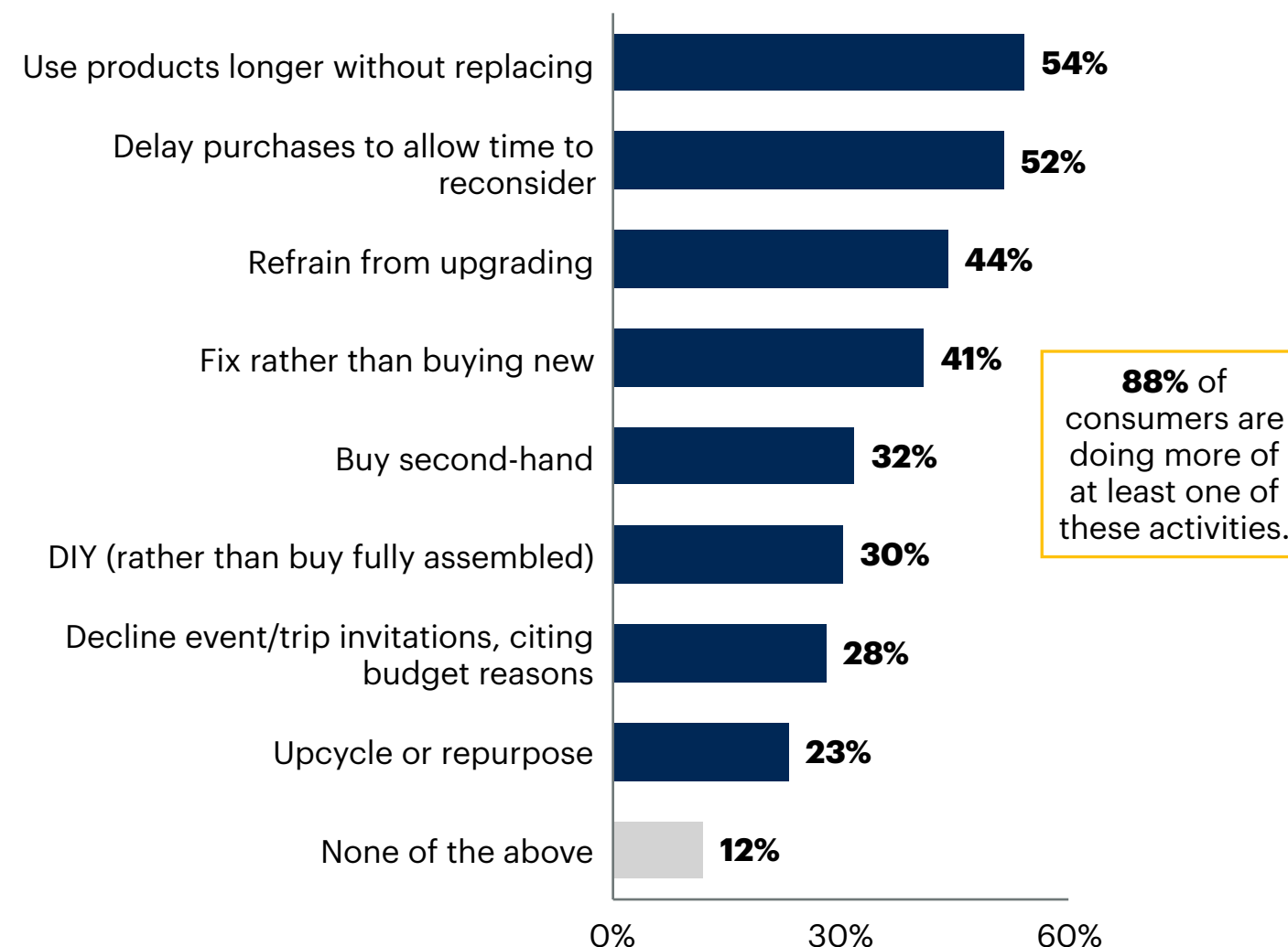
### Strategy Implications

Support consumers' underconsumption goals. While trends like underconsumption might feel like bad news for brands, they offer opportunities for many to lean into their values like transparency, durability and sustainability to win over consumers who are trying to curb their consumption habits.

Embrace the concept of “playful austerity” if your brand supports no-frills values. Strike a balance between minimalism and enjoyment to demonstrate that your brand can focus on aspects like practicality, quality and sustainability without sacrificing style or fun.

### » Figure 4. Activities Consumers Do More Than Two Years Ago

Percentage of respondents



n = 1,455 U.S. consumers age 18+

Q. Compared to two years ago, which of the following have you done more than before?

Source: 2024 Gartner Cultural Attitudes and Behaviors Survey

## Embraceable Automation

While generative AI (GenAI) has grabbed headlines and concerned consumers, a whole host of in-real-life (IRL) interactive automation has quietly captured the hearts and engagement of humans. When asked about automated tech (for example, self-driving taxis, delivery drones, cashierless stores, roborestaurant servers and baristas), 74% of U.S. consumers express openness to using the technology. Although transactional reasons are a primary motivator, two-thirds (68%) also express nontransactional reasons like novelty and excitement (see Figure 5).<sup>2</sup>

"It was pretty neat having a [robot] cat deliver our sushi for my family for dinner. My kids absolutely loved it as it was so unique."

**James**, millennial from IL<sup>4</sup>

### Strategy Implications

Lean in to embodied technology. Human-free automated services or experiences offer an alternative pathway to engaging consumers via tech.

Get the transactional benefits right. Consumers' onramps to embraceable automation are speed and convenience. It may be counterintuitive, but novelty and fun reinforce, rather than establish, value.

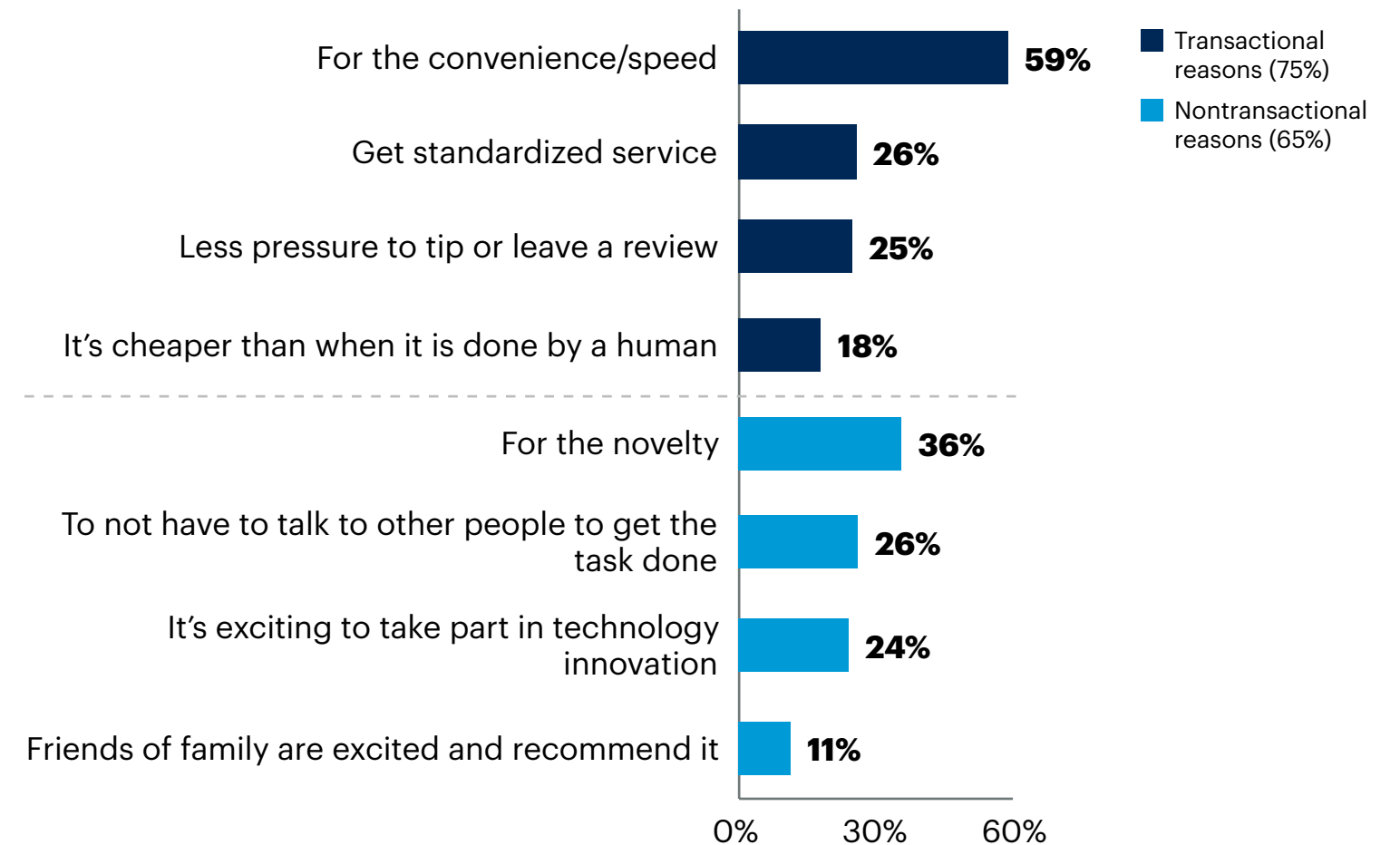


### The Boomer Boom

They may have gotten older, but baby boomers are still living their best lives, especially compared to younger consumers. Compared to younger generations, baby boomers are more likely to feel excellent or good about their personal life, their finances and the economy.<sup>3</sup> Differences in attitudes and behaviors along life stages are to be expected. But the boomer boom reflects something more profound and urgent, especially for brands that must make authentic connections across generational cohorts. Upbeat themes and traditional media strategies are needed to reach baby boomers.

### » Figure 5. Reasons Consumers Try Human-Free Tech

Percentage of respondents



n = 1,498 U.S. consumers age 15+, excluding respondents who reported being unwilling to try any automated tech surveyed

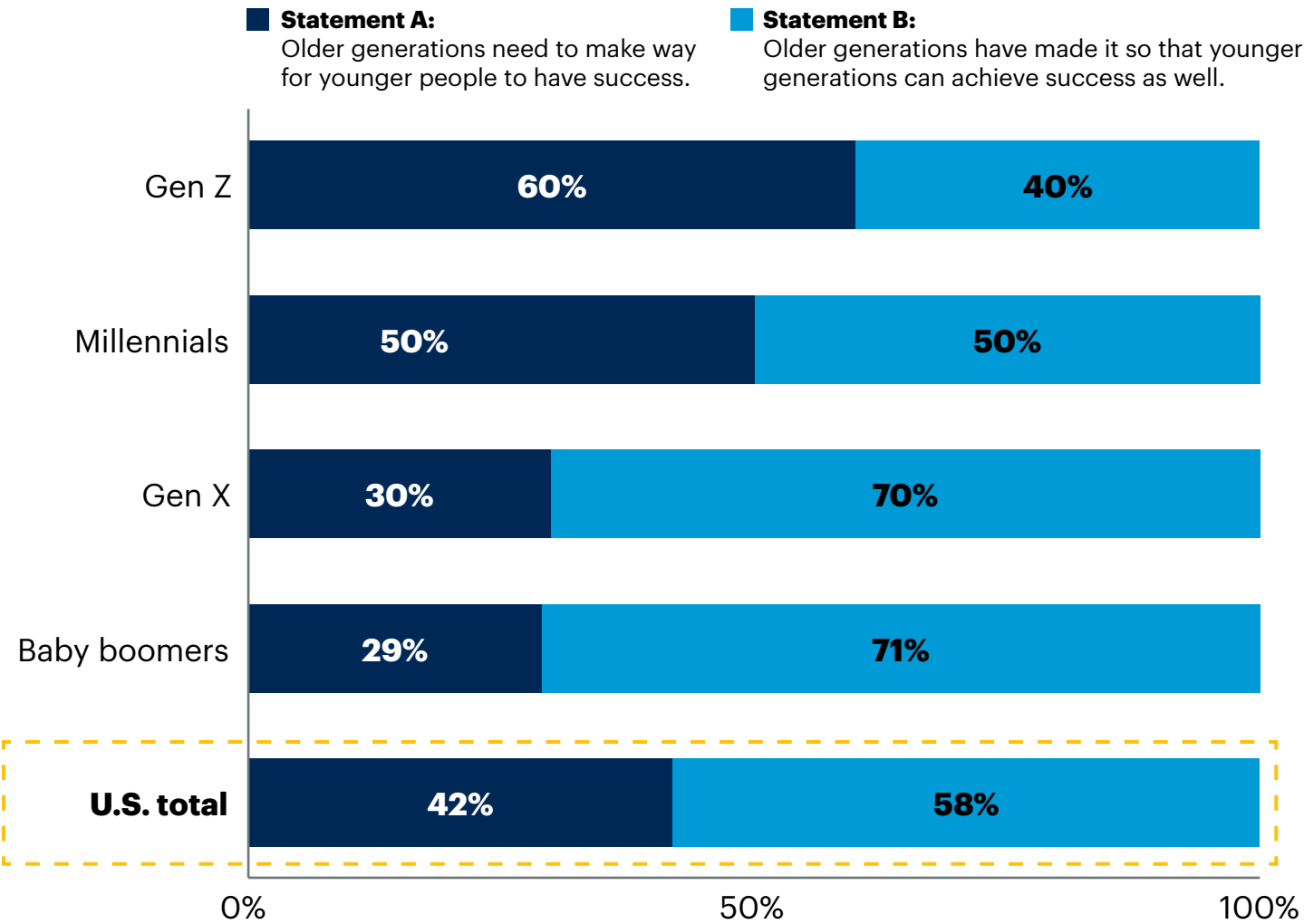
Q. What do you think are the main reasons that you would try or have already used any of the technology devices/services that you selected in the previous question?

Source: 2024 Gartner Culture Attitudes Behaviors Survey

Note: Examples given include using a self-service kiosk, order from a voice chatbot at a restaurant and an AI-enabled home maintenance device. "Other" and "none of the above" not shown.



» **Figure 6. Consumer Views on Role of Older Generations**  
Percentage of respondents agreeing to each statement, by generation



n = 1,532 U.S. consumers age 15+  
Q. Please read the below pairs of statements which you agree with more — that is “much more” or just “somewhat more” than the other statement.  
Source: 2024 Gartner Cultural Attitudes and Behaviors Survey

Attitudinal differences between younger and older consumers can result in conflict: 49% of consumers say they’ve experienced a generational clash.<sup>5</sup> Those differences also manifest in how consumers view each other. Seventy-one percent of baby boomers say older generations have made it so that younger generations can achieve success; only 40% of Gen Z consumers concur<sup>2</sup> (see Figure 6).

Strategy Implications

Be a brand for celebration to resonate with feel-good boomers and demonstrate your brand’s recognition of their worth.

Take advantage of natural younger/older social media self-segmenting to test and run more generationally targeted positioning and messaging.

Lifestyle Survey in July or August 2024. The remaining 423 respondents were aged 15+ and had volunteered or registered to participate in online surveys. The survey included screening, demographic and category-specific (such as technology, media, workplace, spending and shopping) questions. Quotas in both the recontacted and overall samples were set for geographic areas, age, gender, ethnicity and employment status to approximate the U.S. population as a whole.

<sup>3</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, 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>4</sup> **Gartner Consumer Community** (n = 303), 18 through 25 October 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.

<sup>5</sup> **Gartner Consumer Community** (n = 289), 24 through 31 October 2024.

<sup>6</sup> **Gartner Consumer Community** (n = 276), 27 September through 4 October 2024.

All surveys were developed collaboratively by a team of Gartner researchers who follow the market, and were reviewed, tested and administered by Gartner’s Research Data and Analytics team.



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2025 Predicts

# Prepare to Serve Human and Machine Customers

by Emily Weiss, Brad Jashinsky, Suzanne Schwartz, Kassi Socha, Ian Livingston, Emma Mathison, Dan Gutter, Kate Muhl, Nicole Greene, Claudia Ratterman, Lizzy Foo Kune, Leah Leachman, Ross Cosner, Chris Ross, Noam Dorros

CMOs are contending with organizational changes, privacy concerns, and fallout from misinformation overload, all while AI cements its value to the marketing function. CMOs can use this research to prepare and position their organizations for disruption and capitalize on unique opportunities.

CMOs have a new customer — AI delegates. Consumers are disillusioned with the sheer volume of online content (including misinformation) to contend with and wary of new pricing models, making the prospect of automating relationships and interactions with brands more enticing. We predict consumers will trade screentime on channels such as social media, mobile apps and search for experiences that offer more connection and feelings of community with other humans. And as humans cede digital interactions to AI, that means the majority of data brands collect will be generative AI-led (GenAI-led) and generated.

Brands will need to bifurcate their strategies to satisfy two different customers: the human and the machine. This change will force organizations to reevaluate their identity. The majority of surveyed CMOs agree that a repositioning is needed to achieve strategic goals in this new consumer ecosystem.<sup>1</sup> CMOs can leverage this Predicts research to establish organizational readiness and prepare for disruption.

**Strategic Planning Assumption:** By 2026, more than one-third of web content will be developed exclusively for AI and search engine consumption.

**Analysis by:** Kassi Socha, Ian Livingston, Noam Dorros

**Key Findings:**

- Brands are increasingly requiring AI skills when hiring for search engine optimization (SEO) and content jobs. From 1H23 to 1H24, the share of SEO and content roles containing AI-related keywords in job descriptions increased by 116%.<sup>2</sup> Furthermore, 41% of content job descriptions require search-related skills.<sup>3</sup>
- In 2024, organic and paid search traffic drove 27.76% of mobile traffic to 1,792 B2C and B2B Digital IQ Index brand websites across 12 industries.<sup>4</sup>
- As of October 2024, 41% of organic search results appearing in the top three positions also appeared in AI overviews on the same search engine results page (SERP).<sup>5</sup>
- On average, CMOs allocated almost one-quarter (24%) of their digital marketing budget to search.<sup>6</sup>

**Market Implications:**

Despite increasing investments, most organizations are merely staying afloat at maintaining existing search traffic. Changes in strategy will be required to adapt and drive traffic growth. CMOs and their teams will need to adjust their web content strategy to support or better inform search engine’s evolving algorithms and appear in GenAI-powered search results (Google’s GenAI overview, Microsoft’s Copilot) to realize growth from search investments.

CMOs will need to direct their function to hire talent with a strong understanding of how GenAI or broader AI influences how content performs in search algorithms. The number of search and content job descriptions that mention needing an AI skill set has increased 116% between 1H23 and 2H24 (see Figure 1).<sup>2</sup>



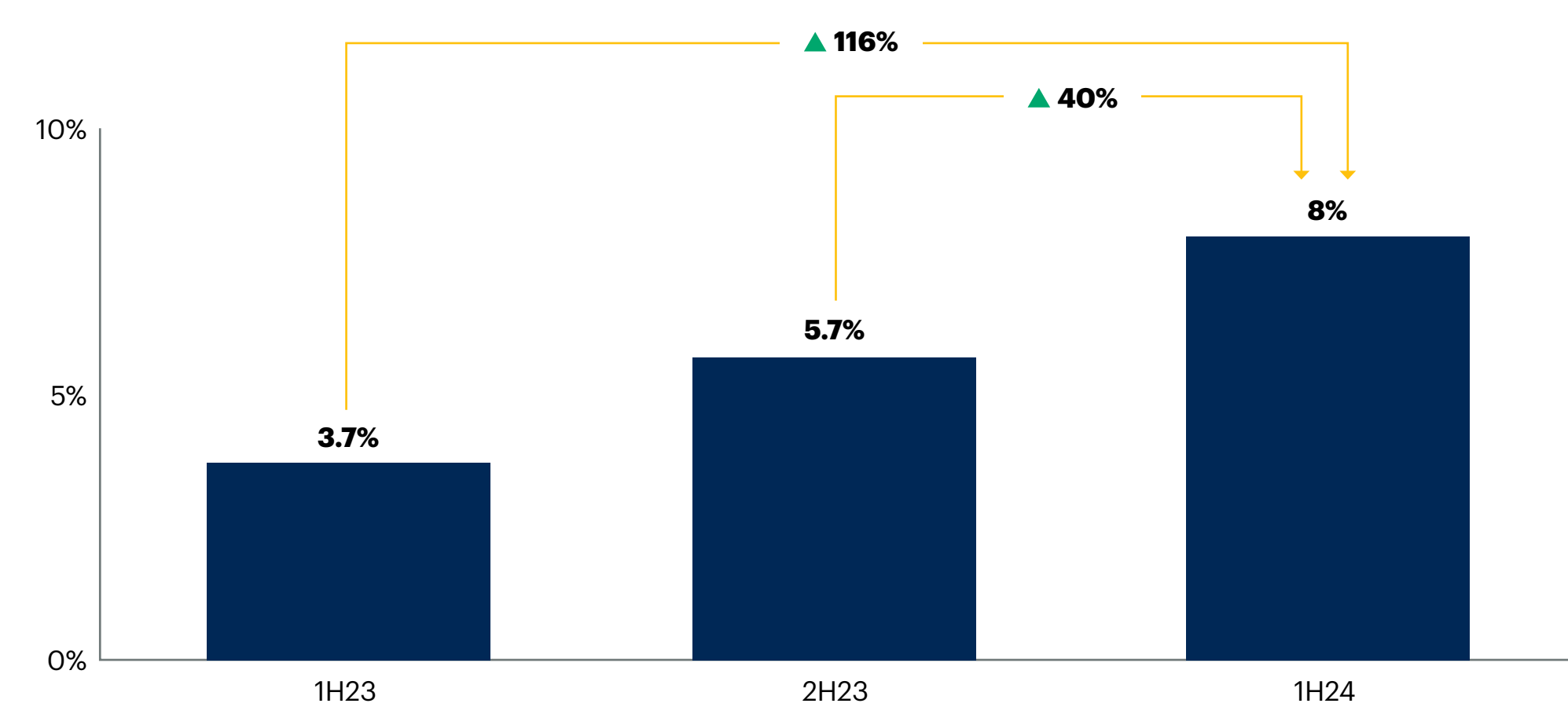
GenAI can help specialists work more efficiently and effectively, from analyzing search trends to creating content. Furthermore, content talent increasingly needs to be both creative but also driven by insights, which requires being informed on the latest search trends.<sup>3</sup>

CMOs should not abandon organic and paid search fundamentals as they seek to adapt to GenAI-powered search and invest in relevant talent. Fundamental search principles still apply; they will help content adapt to both current and future-state algorithmic shifts.

**Recommendations:**

- Upskill the function by investing in search and content talent with AI skill sets and familiarity with creating or optimizing content to train and rank within evolving search algorithms. Require content talent to have a firm understanding of how search operates.
- Audit your current website content for changes in referral source behavior, specifically identifying pages where organic-search-driven traffic has decreased. Determine if this is because the content is no longer optimized for current search best practices or if the content is no longer relevant to end users.

» **Figure 1. Share of Job Descriptions Containing GenAI Keywords**  
Percentage of leaders selecting each statement



n = 10,827 LinkedIn job descriptions  
Source: Gartner analysis of Coresignal data  
Note: GenAI = generative AI

**Strategic Planning Assumption:** By 2028, digital marketers will allocate 30% of their paid social budget to support advertising and partnerships on subscription-based channels.

**Analysis by:** Emma Mathison, Dan Gutter

**Key Findings:**

- CMOs have long prioritized social channels: Since 2022, marketing consistently spends more on social than on any other digital channel. Yet brand engagement from consumers — including social purchasing — has been declining since 2021.
- Consumers have become disenchanted with social media platforms<sup>7</sup> as a source of entertainment, product inspiration and product recommendations;<sup>11</sup> instead, they view subscription-based channels and the content creators there as the better alternative.
- Subscription-based channels like Substack,<sup>8</sup> Patreon<sup>9</sup> and Discord<sup>10</sup> already report healthy usage rates, with indications of growth. Popular content creators are expanding to these platforms, and consumers are following along.

**Market Implications:**

It is becoming more challenging for brands to maintain, let alone grow, their reach and engagement among consumers. This is especially true as consumers shift their tech and media behaviors away from social media to other platforms and subscription-based channels. In 2024, B2C marketing leaders surveyed in Gartner’s 2024 CMO Spend Survey reported allocating 14.3% for their digital channel budget to social media advertising (an increase from 12.3% in 2023).<sup>6</sup>

But increased efforts may prove futile: The percentage of consumers who turn to brands’ social media pages, across the customer journey, has been declining since 2019.<sup>11</sup> Importantly, the percentage of consumers who made a social purchase dropped by nearly 30% since 2021<sup>11</sup>

It’s not just brands losing the interest of consumers on social media — consumers are dissatisfied with the platforms and their content as a whole. In early 2024, Gartner’s Consumer Omnibus Survey found that over half of U.S. consumers had pulled back their usage on social media in the past year. The most common reason being that they no longer enjoyed using it.<sup>7</sup>

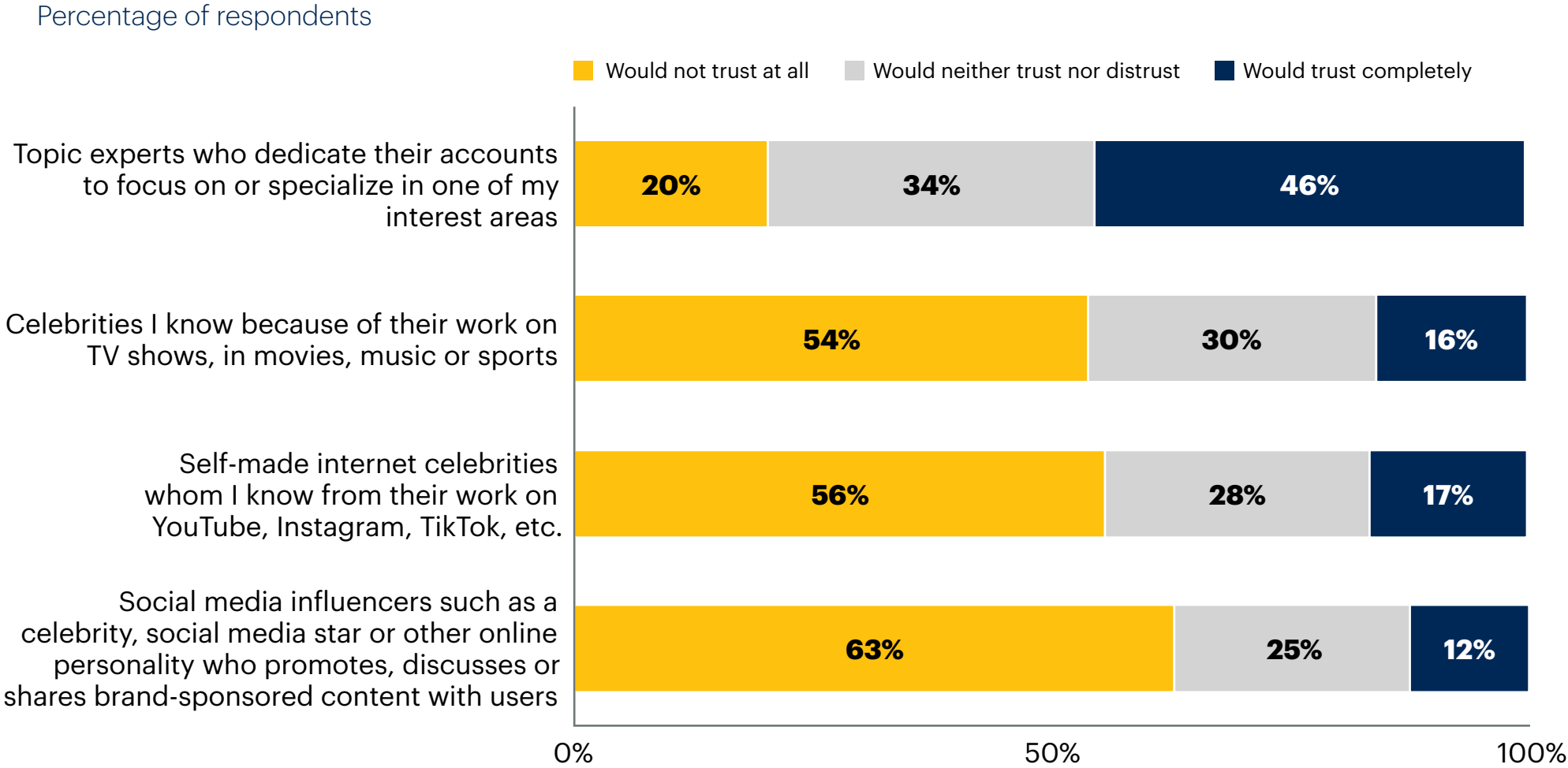
Closed-group communities and subscription channels offer a potential alternative for social-media-weary consumers. Brands can leverage closed-group subscription channels and the professional creators on them to reach relevant target audiences who are already engaging with content they self-selected into consuming. Skin care brand Medik<sup>8</sup> reported a significant increase in daily traffic to its U.S. website based on its partnership with Emily Sundberg’s “Feed Me” Substack, resulting in a 204% return on ad spend.<sup>12</sup>

Consumers already express a willingness to pay for content produced by their favorite creators and topical experts. Forty-seven percent of Gartner Consumer Community respondents agree that content creators on subscription services are more likely to sell what they believe in than influencers on social media.<sup>13</sup> And 46% of respondents state they would trust recommendations of product experts versus just 16% who would trust celebrity recommendations (see Figure 2).<sup>13</sup>

Recommendations:

- Conduct an audit of your social media channel and campaign performance to ensure that you are adequately measuring consumer engagement with your brand. Consider whether changes in spend/allocation have truly translated to a positive impact on performance.
- Balance your strategic bets on more niche subscription channels with campaigns that have mass reach by assembling audiences based on their media habits. Review your target audience, leverage planning and forecast tools (both in platform and via third-party tools), and recalibrate expectations on reach and engagement.
- Consult with and evaluate your current influencer network internally or with external agencies. Many content creators maintain presence on social media as well as these closed-group subscription platforms, creating opportunities to continue partnerships while entering new channels.

» Figure 2. Consumer Trust in Product Recommendations



n = 292 U.S. consumers ages 18+  
Q. Regardless of if you currently subscribe: On a scale of 1 to 5, where 1 is “would not trust at all” and 5 is “would trust completely,” how much would you trust product recommendations from each of the following?  
Source: 2024 Gartner Consumer Community 18-25 October 2024  
Note: Percentages may not total to 100 due to rounding

**Strategic Planning Assumption:** By 2028, half of B2C companies that use dynamic pricing algorithms will abandon them in an effort to foster trust and differentiate their brands with consumers.

**Analysis by:** Kate Muhl

#### Key Findings:

- Consumers are deeply wary of dynamic pricing — the practice of basing prices on market trends like customer demand, competitor pricing or inventory levels and using technologies like artificial intelligence and machine learning to do so in near real time.
- Consumers who have experienced dynamic pricing are even more skeptical. Forty-eight percent of consumers disagree that dynamic pricing helps consumers get the most fair prices, but that number jumps to 64% of consumers who’ve experienced dynamic pricing.<sup>14</sup>
- Offering nondynamic, consistent pricing is a powerful tool for building brand trust. Seventy-nine percent of consumers agree that they are more likely to buy from brands that have consistent pricing. And 42% of consumers say they’d be willing to spend more on a product if consistent pricing is guaranteed.<sup>14</sup>

#### Market Implications:

In June 2024, Walmart announced it would bring digital shelf labels to 2,300 stores by 2026.<sup>15</sup> The advent of such digital signage technologies, powered by GenAI, has made dynamic pricing viable. The practice is well-established in businesses beyond categories like travel and hospitality and on platforms like Amazon. The dynamic pricing software market is sized at roughly \$3 billion in 2024, up from \$2.6 billion in 2023.<sup>16</sup>

Yet, consumers express deep wariness over brand and retailer use of dynamic pricing (see Figure 3).

The expanded use of dynamic pricing comes at a particularly sensitive moment for the consumer-brand relationship. Half of U.S. consumers — and nearly six out of 10 members of Gen Z — say that compared to five years ago, it’s harder for a brand to earn their trust today.<sup>17</sup> According to Gartner’s 2024 Consumer Values and Lifestyle Survey, the percentage of consumers who say they trust big brands fell to 52%. This is the lowest level since 2019 and even lower than when inflation was at its peak.<sup>17</sup>

Consumers who have experienced dynamic pricing are more negative about its potential to the customer than those who are merely aware of the practice. In fact, the mere suggestion that dynamic pricing is coming can inspire backlash, as burger chain Wendy’s found out in early 2024. On an earnings call, CEO Kirk Tanner said the company would be testing dynamic pricing, which the media characterized as “surge pricing.” Public backlash was swift and severe. Wendy’s backtracked on the plan immediately.<sup>18</sup>

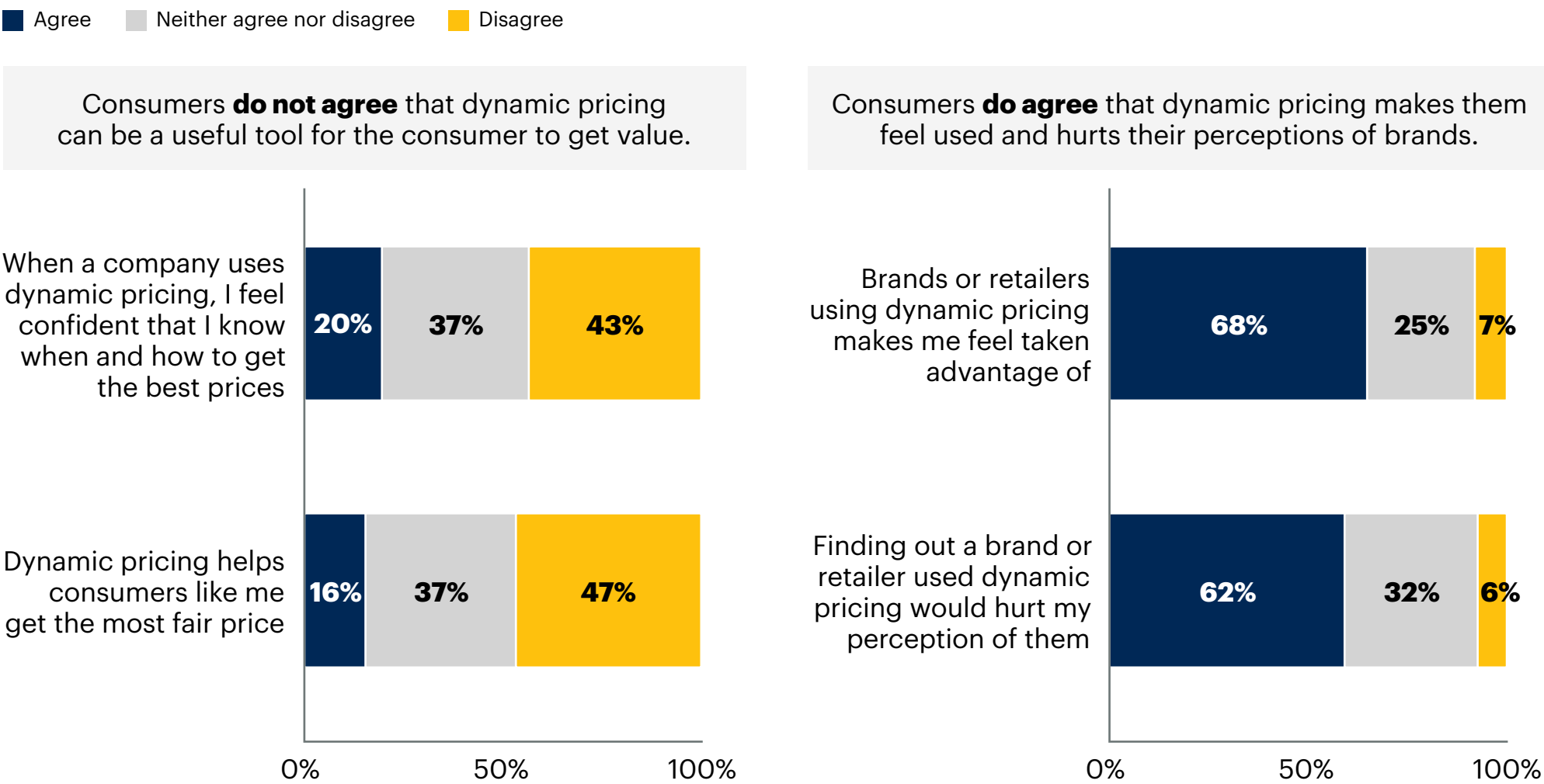
CMOs of organizations that embrace dynamic pricing as nonnegotiable must be diligent in their communications strategies to make sure the use of dynamic pricing is well-positioned as a tool to benefit both customers and the business. Seventy-nine percent of consumers agree that they are more likely to buy from brands that have consistent pricing.<sup>14</sup>



Recommendations:

- Evaluate the possible long-term negative brand impacts of the short-term revenue gain from dynamic pricing.
- Embrace uniform pricing as a loyalty perk and a brand differentiator, especially in fast-moving parts of the consumer economy where dynamic pricing is likely to take hold. Forty-two percent of consumers say they’d be willing to spend more on a product if consistent pricing is guaranteed.<sup>14</sup>
- Provide “insider advice” to your highly engaged consumers via social channels to empower them to “game” your system for lower prices.

» Figure 3. Consumer Sentiment Toward Dynamic Pricing



n = 303 U.S. consumers ages 15+  
Q. How much do you agree or disagree with the following statements?  
Source: Gartner Consumer Community 18-25 October 2024

**Strategic Planning Assumption:** By 2028, mass digital detoxing will force CMOs to spend 70% of their total marketing budgets on offline channels to better engage consumers.

**Analysis by:** Nicole Greene, Claudia Ratterman, Suzanne Schwartz

**Key Findings:**

- Consumers are evaluating the impact that various aspects of technology, like social media and GenAI, have on their overall health and happiness. From 2023 through 2024, 65% of consumers who have pulled back from social media did so due to experiencing less enjoyment on the apps. Fifty-seven percent pulled back to benefit their emotional well-being.<sup>7</sup>
- Consumers are also prioritizing shared experiences, both live and virtual, as they seek to stay present in the moment. Fifteen percent of consumers have already reported some time spent going totally tech-free (forgoing all screens/tech devices and entertainment) in the past six months.<sup>18</sup>
- At the same time, the majority of surveyed customers — 80% — use their smartphone while shopping in stores, interacting with digital channels while in a physical space (when checking prices, for instance).<sup>17</sup>

- CMOs identified personalization, multichannel marketing and customer journey orchestration as their most significant capability gaps in 2024.<sup>6</sup> These capabilities will be fundamental to the success of a brand attempting to connect with customers who are participating in digital detoxes.

**Market Implications:**

Driven by misinformation fatigue, declining trust and poor customer experiences across digital channels, consumers are making an active effort to reduce their screen time. While some rely on focus apps to avoid digital distractions,<sup>19</sup> others are going a step further, with a reported rise in consumers committing to “digital detoxing.” This is defined as “a disconnection from devices or social media for a defined duration.”<sup>20</sup>

This effort to scale back the scrolling drives consumers to seek out opportunities to participate in real-time, shared experiences. Since 2020, the percentage of consumers who agree that virtual experiences are an adequate replacement for in-person ones has declined considerably, hitting a new low of only 24% in 2024.<sup>11</sup>

At the same time, consumers have become accustomed to using their mobile devices to enhance and inform their in-person experiences. Thus, both live and virtual features will drive consumer engagement and raise expectations of digital-physical offerings in the future. CMOs should explore ways to seamlessly insert their brands into real-time physical moments and associated digital extensions to ensure that they capture consumer attention. Instant gratification, driven by the accessibility of AI technology, will mean brands that wait for consumers to engage online might be too late to showcase differentiation or win a purchase.

**Recommendations:**

- Invest in strategies that harmonize physical and digital interactions — such as geofencing campaigns, Internet of Things (IoT) connectivity and omnichannel shopping — to meet consumers where they are. Adjust metrics to prioritize quality interactions over sheer screen time.
- Prioritize key customer segments and offer them the type of blended physical-digital experiences they seek. This requires pivoting marketing investments to physical experiences and using technology, including AI and mobile apps, to deliver on needs immediately, during events and at scale.

**Strategic Planning Assumption:** By 2027, 85% of customer data will be collected from automated interactions or those led by AI agents.

**Analysis by:** Nicole Greene, Lizzy Foo Kune

**Key Findings:**

- AI agents are autonomous or semiautonomous software capabilities that use AI techniques to perceive, make decisions, take actions and achieve goals in their digital or physical environments.<sup>21</sup>
- Efforts to manually anonymize and deidentify datasets (that is, remove information that links a data record to a specific individual) are often time-consuming and labor-intensive.<sup>22</sup> This can delay projects and lengthen the training-time cycles for development of machine learning algorithms and models.
- Businesses will need to prepare for the volume of data generated from new customer interactions across a brand’s automated and agentic touchpoints, as well as from its customers’ AI agents when they extract information from the business’s properties.<sup>23</sup>

**Market Implications:**

Current AI models, such as large language models (LLMs), can’t autonomously execute tasks and adapt in complex environments. However, as new levels of intelligence are added, new AI agents are poised to quickly become more capable and reliable, allowing brands to better address customer-facing use cases. There will eventually be more AI agents than people; current approaches require human supervision, but that won’t always be possible. Marketers will need to determine when and how they can trust AI agents to take action on behalf of the brand and customers across key areas.

The creation of AI-driven interactions from autonomous agents and the ability of multiagent systems to share information and improve outcomes for customers will speed up data collection and processing, reducing time to market. AI will also help process the vast amounts of unstructured data it creates. As the technology advances, AI agent capabilities to manage complex dialogues, interpret customer emotions and predict customer needs with remarkable precision will improve the ability of marketers to meet customer needs faster and better.

High-quality data is essential for maximizing the potential of AI-driven customer insights, since AI agents learn from source data. With only 4% of CIOs and tech leaders reporting their current data as AI-ready,<sup>24</sup> organizations must prioritize data preparation and anticipate higher volumes of data coming from future AI-agent-assisted customer interactions. As AI agents become integral to customer interactions and take actions on a customer’s behalf, regulatory scrutiny will intensify regarding data collection, storage and usage. Businesses must ensure compliance with evolving data protection laws to avoid legal repercussions.

**Recommendations:**

- Use AI-generated insights to create more personalized customer experiences. Develop the capacities now across data, metadata, API development, workflow optimization and distribution to prepare for an AI-agent-driven autonomous future.
- Establish robust data governance frameworks to ensure ethical use of customer data. Implement transparent data collection practices and secure explicit consent from customers to build trust and comply with regulations.
- Ask vendors for proven examples of AI agents that demonstrate clear value through integration with systems, such as brand agents that help customers find what they’re looking for faster, and multiagent environments.

**Strategic Planning Assumption:** By 2027, mobile app usage will decrease by 25% as audiences shift to using AI assistants.

**Analysis by:** Brad Jashinsky, Suzanne Schwartz

**Key Findings:**

- Global app downloads across iOS and Google Play declined by 1.7% year over year in 2Q24.<sup>25</sup>
- ChatGPT is one of the fastest-growing apps in history and has reached over 218 million global monthly active users as of September 2024.<sup>26</sup> The ChatGPT app has added over 176 million monthly active users since September 2023.<sup>27</sup>
- Mobile applications had the lowest budget allocation across marketing programs and operational areas, according to Gartner’s 2024 CMO Spend Survey.<sup>6</sup>
- In 2023, the average smartphone user installed 2.5 fewer apps than they did in 2020.<sup>28</sup>

**Market Implications:**

Smartphone users will turn to AI assistants — such as Apple Intelligence, ChatGPT, Google Gemini and Meta AI — to replace apps for many functions. As app usage declines, apps will be consolidated across separate brands and companies, creating mobile app partnerships or consortiums to reach more users per app at scale and defray the cost of creation and maintenance.

CMOs should begin planning for the impacts of decreased mobile app usage. Brands with low app engagement and retention will likely be first impacted. This will be a positive development for brands that are not overly reliant on driving revenue via apps, since app development costs will decrease. Brands that are reliant on driving revenue from apps may be severely impacted by the disintermediation of users turning to AI assistants for services. The loss of app users will also result in the loss of first-party data collection and the ability to reach users via mobile push notifications.

**Recommendations:**

- Focus on internal consolidation opportunities first. Work with other departments to create an app task force to review app usage, run voice of the customer (VoC) surveys, and identify functionality duplication across apps.
- Review app store policies to understand how certain partnerships may change or prohibit app commission structures.
- Reach out to partners such as aggregators, distributors and marketplaces to explore mobile app partnerships or consortiums.
- Build AI assistant experimentation into your mobile app roadmap to prepare for opportunities to integrate with AI assistants, and bolster app usage by joining with AI assistants to maintain relevance.
- Consider the possible trade-offs of partnering with other mobile apps, such as lower development costs for the loss of first-party data.



<sup>1</sup> **2024 Gartner Marketing and Narrative Impact Survey.** This survey examined marketing strategies, activities and impacts related to corporate narratives and supporting resources. It was conducted online from November through December 2023. The 1,154 respondents were from the U.S. (n = 684), Canada (n = 236) and the U.K. (n = 234). All respondents reported: (1) awareness of their company’s corporate narrative (or equivalent resource); and (2) regularly communicating about their company’s identity and direction to internal or external audiences. Sixteen percent of respondents were senior leaders, and 84% were entry-level managers or individual contributors. Twenty percent of respondents worked in a marketing function, and 80% worked in other functions. Respondents came from a variety of industries, including insurance, nonhealth (n = 173), pharmaceuticals (n = 130), IT products and high tech (n = 123), business services (n = 119), manufacturing (n = 117), healthcare providers (n = 116), banking/investment services (n = 102), health insurance (n = 88), retail (n = 62), consumer products, (n = 51), and others (n = 73). 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> **Gartner analysis of Coresignal data** (n = 10,827 job posts from 5,372 companies, 1 January 2023 through 30 June 2024). 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 titles and content of job descriptions. From these models, Gartner produces skills, qualifications and responsibilities sought within job posts. These samples may not be representative of general hiring trends and the data should only be used for directional insights.

<sup>3</sup> **Gartner analysis of Coresignal data** (n = 3,891 job posts from 2,730 companies, 1 January 2023 through 30 June 2024). 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 titles and content of job descriptions. From these models, Gartner produces skills, qualifications and responsibilities sought within job posts. These samples may not be representative of general hiring trends and the data should only be used for directional insights.

<sup>4</sup> **Gartner analysis of Similarweb data** (n = 1,792 Index brands, 1 January 2023 through 30 September 2024). Similarweb is a third-party data source that captures website traffic and engagement, email referral traffic and LinkedIn traffic. Similarweb gathers data from a panel of hundreds of millions of monitored desktop and mobile devices, local internet service providers, public data sources, and directly from sites’ first-party analytics. For more information about Gartner’s Digital IQ Index, see [Inside the Gartner Digital IQ: A Guide to Methodology and Use](#).

<sup>5</sup> **Gartner analysis of Google search data** (n = 581 keywords, October 2024). This research uses data from Google search engine result pages (SERPs) collected from the New York City area by a proprietary Gartner-developed crawler. The keywords selected align to the retail, healthcare, consumer goods, financial services, manufacturing and natural resources, and travel and hospitality sectors, accounting for more than 90 million queries a month. These results should be taken directionally because they do not wholly reflect the targeting parameters that are available to search marketers.

<sup>6</sup> **2024 Gartner CMO Spend Survey.** This survey looked at top-line marketing budgets and aimed to identify how evolving customer journeys, C-suite pressures and cost challenges impact marketing’s spending priorities and channel effectiveness. The research was conducted online from February through March 2024 among 395 respondents in North America (n = 200) and Europe (n = 195). Respondents were required to be involved in decisions pertaining to setting or influencing marketing strategy/planning and to aligning marketing budget/resources, and/or they were required to lead cross-functional programs and strategies with marketing. Seventy-four percent of the respondents came from organizations with \$1 billion or more in annual revenue. Respondents came from a variety of industries: financial services (n = 46), insurance (n = 35), manufacturing (n = 48), consumer products (n = 32), media (n = 35), retail (n = 38), healthcare (n = 47), pharma (n = 37), IT and business services (n = 41), and travel and hospitality (n = 36). 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>7</sup> **2024 Gartner Consumer Omnibus Survey.** The purpose of this survey was to understand consumer behaviors and sentiment across a wide range of topics and industries that included retail, media behaviors, purchase decisions, financial services, generative AI, fake content and consumer loyalty. The research was conducted online from 11 April through 13 May 2024 among 2,001 respondents in the United States. Respondents were required to be at least 18 years old. Quotas were set for geographic areas, age, gender, ethnicity and employment status to approximate the U.S. adult population as a whole.

<sup>8</sup> [Substack Says It Now Has More Than 3 Million Paid Subscriptions](#), Axios.<sup>6</sup>

<sup>9</sup> [The Story of Patreon](#), Patreon.

<sup>10</sup> [Average Monthly Traffic to Discord.com Worldwide From October 2023 to March 2024](#), Statista.

<sup>11</sup> **2024 Gartner Consumer Values and Lifestyle Survey** (trended references to 2019 and 2021). 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 populations as a whole.

<sup>12</sup> [Blogging Is Back: How Beauty Brands Are Capitalizing on Substack’s Growing Influence](#), BeautyMatter.

<sup>13</sup> **2024 Gartner Consumer Community Survey** (n = 292, 18 through 25 October 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.

<sup>14</sup> **2024 Gartner Consumer Community Survey** (n = 303, 18 through 25 October 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.

<sup>15</sup> [New Tech, Better Outcomes: Digital Shelf Labels Are a Win for Customers and Associates](#), Walmart.

<sup>16</sup> [2024-2033 Dynamic Pricing Software Market Outlook: Unlocking Growth Potential](#), The Business Research Company.

<sup>17</sup> **Gartner Consumer Values and Lifestyle Survey 2024** (trended references to 2016). 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 populations as a whole.

<sup>18</sup> [Wendy’s Backtracks on Dynamic Pricing](#), Restaurant Dive.

<sup>19</sup> [How I Got My Attention Span Back](#), The Wall Street Journal.

<sup>20</sup> [A Comprehensive Review on Digital Detox: A Newer Health and Wellness Trend in the Current Era](#), Cureus.

<sup>21</sup> [Innovation Insight: AI Agents](#)

<sup>22</sup> [Emerging Tech Roundup: Navigating Confusion Around Synthetic Data](#)

<sup>23</sup> [Develop an AI Strategic Roadmap for Marketing](#)

<sup>24</sup> **Gartner 2023 IT Symposium Research Super Focus Group** (7 August 2023). n = 72 CIOs and senior IT leaders from North America, the U.K. and Europe. More than half of respondents came from the C-suite and large enterprises. The data was collected through a live polling session as part of our research for the 2023 IT Symposium Opening Keynote.

<sup>25</sup> [Q2 2024 Digital Market Index Report](#), Sensor Tower.

<sup>26</sup> [ChatGPT Sets Record for Fastest-Growing User Base](#) — Analyst Note, Reuters.

<sup>27</sup> **Gartner analysis of Sensor Tower data** (September 2023 through September 2024). Sensor Tower is a third-party data source that captures mobile app analytics. Sensor Tower uses publicly available app store data trained on proprietary customer data.

<sup>28</sup> [Consumers Are Using and Installing Fewer Mobile Apps as They Settle on Favorites](#), EMARKETER.

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# Develop an AI Strategic Roadmap

by Nicole Greene, Leah Leachman, Don Scheibenreif, Chad Storlie

Marketing is a leader in generative AI adoption for organizations, but focusing on short-term results limits long-term growth. Use this research to evolve AI-enabled capabilities and leverage the human-machine relationship across three strategic planning horizons to reach marketing goals.





CMOs’ most sought-after benefits of generative AI (GenAI) are productivity and cost reduction, followed by enhancing the customer experience.<sup>1</sup> While removing manual and mundane tasks is a win in the short term, CMOs need to build strategic roadmaps that address how they will optimize AI now, in the midterm and for the future.

Specifically, CMOs must identify and plan for how marketing will leverage customer data, empower employees and govern the work to harness the innovation and ROI that GenAI can bring. Without a roadmap for differentiation, most brands will arrive at the same end. Gartner has identified three stages of AI implementation at most organizations (see Figure 1):

- AI as a tool
- AI as an agent
- AI as an influencer

As organizations progress through each stage, the use of AI will become more automatic, and with the introduction of machine customers, AI will be more autonomous.

» Figure 1. Progression of AI Value



Source: Gartner



## AI as a Tool

In this phase, AI planning is company-centric, primarily focusing on internal productivity and operational efficiency. The majority of organizations are currently using AI as a tool. This reflects short-term planning horizons where an organization is in the early stages of AI adoption with a limited number of use cases, which are focused on reducing manual tasks.



## AI as an Agent

AI agents are autonomous or semiautonomous software entities that use AI techniques to perceive, make decisions, take actions and achieve goals in their digital or physical environments. In this phase, planning and AI evolution expand the scope of AI to become more customer-centric and to address use cases that support the delivery of better customer experiences and the unique value that a brand can provide. Early-AI-adopter organizations should start looking now at the midterm planning horizon of AI as an agent, as internal capabilities increase and customers become more comfortable with engaging with AI as part of the brand experience.



## AI as an Influencer

In this phase, AI is woven into the fabric of society (like a mobile phone). AI influences our decisions as businesses and customers. There is a reason AI as an influencer emerges in the long-term planning horizon. The technology isn't there yet. But this research will give you the vision and steps to prepare for a future where AI can lead decisions more autonomously, requiring less human oversight and asserting more influence.

**Short-Term Planning Horizon:  
Focus on Low-Risk Internal Use Cases**

**Guiding principle:** AI is a tool.

**Business impact:** AI is supporting internal stakeholder productivity and experience.

**Strategy:** To prove the value of AI in the near term, work within your system. Evaluate internal applications with your leadership team by prioritizing use cases and performance objectives that support existing KPIs. These low-risk implementations also support the gradual culture change necessary for members of your team to adapt to engaging with the technology. How you guide your leaders to manage the newfound productivity of the team will be key to your long-term success.

**Operations:** The short-term AI as a tool horizon is a critical moment for upskilling employees to ensure they understand how to use AI to help make them more productive and find business efficiencies. Employees want to use AI, but the vast majority (88%) voice a need for more internal guidance. Only 7% of organizations provide comprehensive guidance across key AI topics (for example, how to leverage AI to enhance employees’ workflows, when certain AI technologies will become available, etc.).<sup>2</sup>

**What you should do now to get ahead:** Productivity still ranks low on CEOs’ top strategic business priorities heading into 2025.<sup>3</sup> To showcase marketing’s value to the business, focus on the outcomes that new white-space marketing can fill because of productivity gains. Identify what improved productivity allows the organization to achieve, and ensure leaders and managers in the marketing organization are aligning newfound productivity to support those broader business initiatives.

**How you can mitigate risk:** Take ownership over how customer data is managed and how your organization communicates the use of AI to customers. Use-case-specific data quality and governance are critical components to success of AI applications now and will become more vital in the midterm planning horizon as AI agents begin to engage with each other to make decisions. There is a real risk of losing trust with customers at this moment. CMOs must take a proactive approach through content certification and transparency to help customers understand how their data is used to train AI models and how AI is used to engage them.

## Midterm Planning Horizon: Implement Guardrails to Shape Autonomous Interactions

**Guiding principle:** AI as an agent.

**Business impact:** AI begins to act on its own based on logic and reasoning. It helps find new insights for businesses, employees and customers. AI algorithms improve by helping customers achieve their goals through data analysis that simplifies decision-making.

**Strategy:** Focus on how you can uniquely serve priority customers. Identify target customer segments or personas to ensure GenAI is learning from and producing assets that are focused on the right customers. This is even more important as the volume of messaging and the precision of marketing increase.

**Operations:** AI can act on behalf of both customers and employees, but it still requires validation and a level of oversight by humans that will need to be accounted for in terms of processes and people.

**What you should do now to get ahead:** Marketing needs to evolve to focus on using AI agents to better meet customers where they are, providing information that helps them make decisions based on how brands can uniquely help them. Organizations that focus on the continuous development and refinement of data-driven customer personas will be more successful at using AI to deliver compelling experiences because customers' objectives and needs are a foundational part of their learning architecture.

**How you can mitigate risk:** Brands need to balance investments in brand differentiation to meet the needs of human customers while also investing in logic-based tools to drive the rule-driven decisions of machines. Don't get too far ahead of what the technology is proven to do. Measure your use cases against feasibility and value to ensure you are pacing your ambitions pragmatically.



# Long-Term Planning Horizon: Prepare for Machine-Influenced Decision Making

**Guiding principle:** AI is an influencer.

**Business impact:** CEOs tell us they believe up to 20% of their company’s revenue will come from machine customers by 2030.<sup>3</sup> Last year, Gartner estimated that by 2025, there would be 15 billion connected products with the potential to behave as customers — to shop for services and supplies for themselves and their owners.<sup>1</sup>

These new AI-agent customers will influence buying decisions, act on humans’ behalf and automate and augment tasks and purchases. They will be driven by the rules and logic programmed into them by their human owners, requiring organizations that own and interact with these agents to understand and address the requirements of both machine and human customers.

**Strategy:** CMOs need to rethink the brand-customer relationship to include a new category of customer that isn’t human and can’t be influenced, but is an influencer. For example, a machine customer could generate a written review about a product or service based on its experience with a brand. Machine customers will require marketers to bifurcate their strategies based on human versus machine target audiences. In the near future, they will be able to act autonomously on behalf of customers based on context, preferences and rules set by customers.

**Operations:** Work in partnership with product, sales, customer service, marketing technology, customer experience (CX) and data and analytics leaders to identify scenarios where machine customers can use your products and services.

**What you should do now to get ahead:** Invest in pilots of identified use cases and start with transactions that are low in complexity. Identify critical touchpoints in the customer journey where customers would prefer to delegate their time to a machine customer proxy to:

- Maximize time spent elsewhere
- Increase objectivity
- Remove emotion from decisions, or
- Reduce decision fatigue

At the same time, identify touchpoints in the customer journey where there is the opportunity to differentiate through delivering a human-certified experience.

**How you can mitigate risk:** The combined use of data along different customer journeys for human customers, machine customers and combinations of both will be essential for effective marketing outcomes. The speed of the purchase process by machine customers will make the constant monitoring and optimization of the customer journey and resulting marketing outcomes critical to success.

<sup>1</sup> **Gartner Generative AI 2024 Planning Survey.** This survey was conducted to examine generative AI’s use case implementation and impact by business function. The survey was conducted from September through November 2023. In total, 822 business executives who lead corporate functions outside IT and who indicated will begin or continue to implement generative AI across the next 12 months qualified and participated. The research was collected via online surveys in English. The sample was equally split across the following eight corporate functions: finance; HR; marketing; sales; customer service; supply chain; procurement; and legal, risk and compliance. The sample mix by location was North America (n = 536), Europe (n = 176) and Asia/Pacific (n = 110). The sample mix by size was \$50 million to less than \$500 million (n = 119), \$500 million to less than \$1 billion (n = 129), \$1 billion to less than \$10 billion (n = 374) and \$10 billion or more (n = 200). 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 Managing Organizational Reputation Survey.** This survey sought to explore reputation leaders’ approaches, capabilities and performance, as well as employees’ impact and thoughts on organizational reputation, including issues related to generative AI. It was conducted online from June to July 2023. The 993 respondents were from North America (n = 570), Western Europe (n = 231), Nordics (n = 106) and APAC (n = 86). Nine percent of respondents were reputation leaders who were responsible for reputation management initiatives. Fourteen percent of respondents were cross-functional leaders who regularly communicated to stakeholders about organizational reputation. Seventy-seven percent of respondents were full-time employees without specific reputation management or communications responsibilities. Respondents came from a variety of industries, including financial services (n = 151), healthcare providers (n = 149), manufacturing (n = 136), pharmaceuticals (n = 122), health insurance (n = 71), retail (n = 58), IT or high tech (n = 52), non-health insurance (n = 35), and others. 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>3</sup> **2024 Gartner CEO and Senior Business Executive Survey.** This survey was conducted to examine CEO and senior business executive views on current business issues, as well as some areas of technology agenda impact. The survey was conducted from July 2023 through December 2023, with questions about the period from 2023 through 2025. One-quarter of the survey sample was collected in July 2023, and three-quarters was collected from October through December 2023. In total, 416 actively employed CEOs and other senior executive business leaders qualified and participated. The research was collected via 356 online surveys and 60 telephone interviews. The sample mix by role was CEOs (n = 282); CFOs (n = 81); COOs or other C-level executives (n = 32); and chairs, presidents or board directors (n = 21). The sample mix by location was North America (n = 175), Europe (n = 94), Asia/Pacific (n = 93), Latin America (n = 41), the Middle East (n = 8) and South Africa (n = 5). The sample mix by size was \$50 million to less than \$250 million (n = 77), \$250 million to less than \$1 billion (n = 101), \$1 billion to less than \$10 billion (n = 166), and \$10 billion or more (n = 71). 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.

2024 Marketing Analytics Survey

# How to Prove Value and Receive Credit

by Joseph Enever

CMOs struggle to prove marketing's value and receive credit for business outcomes. Use insight from Gartner's marketing analytics survey to focus on four key areas: a holistic, long-term value story; involvement in D&A activities; closure of talent gaps; and varied, sophisticated metric types.



# CMOs Must Prove Marketing's Value and Get Credit for It

Proving marketing's value to stakeholders and getting credit for helping meet enterprise objectives helps influence the organization's investment in marketing. But only 52% of CMOs and other senior marketing leaders responding to the 2024 Gartner Marketing Analytics and Technology Survey said they were successful in proving value and receiving credit. And the level of success varies by business model, with only 41% of senior marketing leaders for B2B organizations saying they were successful, compared with 53% for B2C marketing leaders.<sup>1</sup>

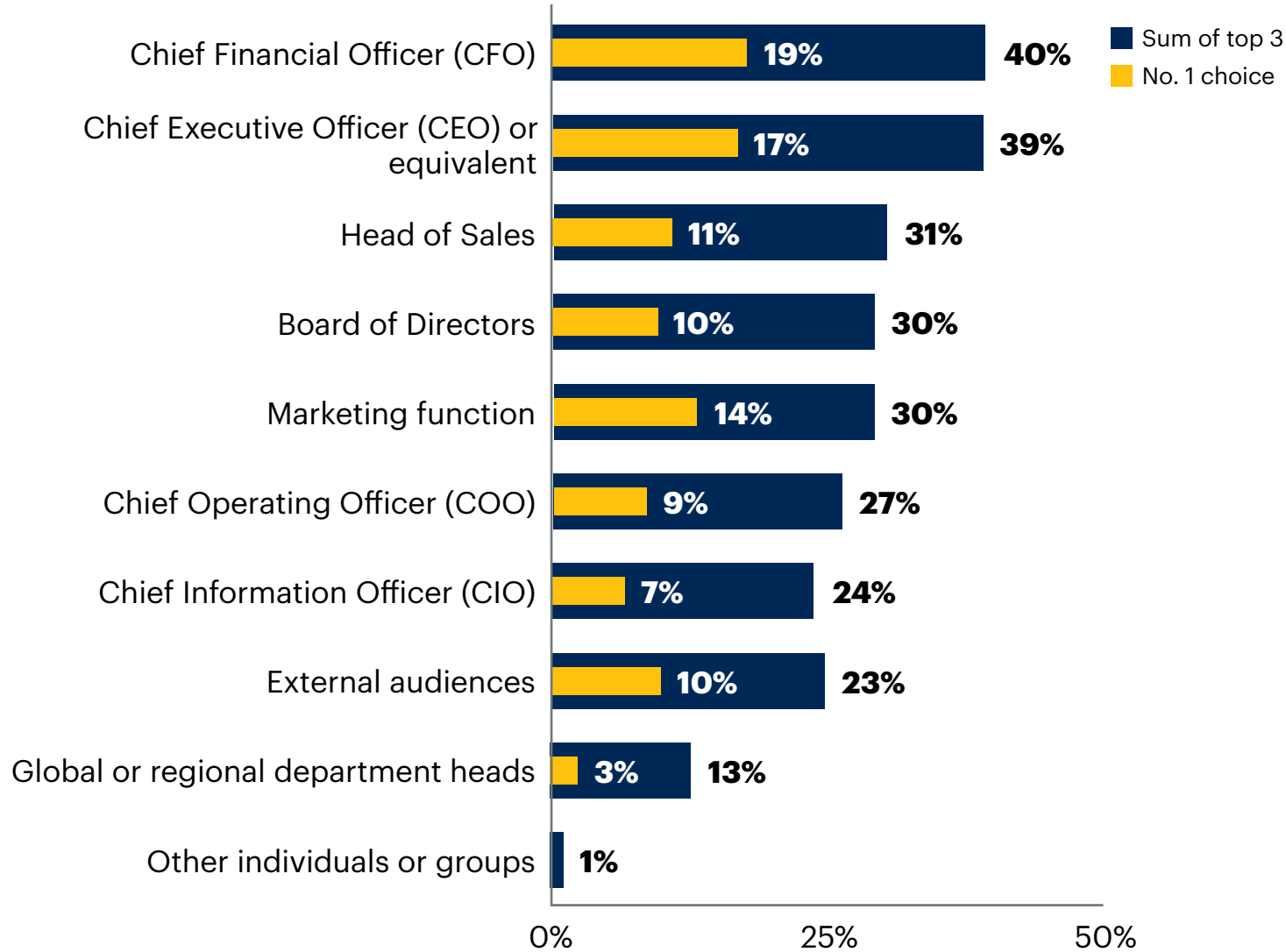
- CMOs in all organizations can prove value by:
- Illustrating ROI to aid budget decisions
  - Showing how marketing efforts create value beyond ROI, such as improved operations and customer relationships
  - Advancing measurement methodologies and metric sophistication to provide deeper insights for strategic decision making

- CMOs can ensure marketing receives credit for outcomes by:
- Building stakeholder relationships
  - Building stakeholder understanding of marketing's contribution toward business outcomes
  - Shifting the beliefs and conventional wisdom of stakeholders
  - Developing the team's soft skills and competencies

## CFOs and CEOs Are Most Skeptical of Marketing's Value

Marketing leaders face a variety of perceptions to overcome when communicating the value of marketing to stakeholders, with the CFO and CEO the most skeptical (see Figure 1). The nature of the skepticism is nuanced but presents an opportunity for the CMO to tailor their approach to proving marketing's value.

» Figure 1. CFO and CEO Most Skeptical of Marketing's Value  
Sum top 3 and top choice



n = 345 senior marketing leaders, excluding don't know/NA  
Q. Which of the following individuals or groups are the most skeptical of marketing's value at your company?  
Source: 2024 Gartner Marketing Analytics and Technology Survey



CEO skepticism about marketing often revolves around the difficulty of measuring its long-term value and strategic impact, leading to concerns about its overall effectiveness:

Chief CEO beliefs include:

- Marketing is important, but it is hard to measure its direct impact on the bottom line.
- Marketing must move from being a cost center to a profit driver.
- Marketing must account for how it contributes to overall business strategy.

CFO skepticism focuses on the financial accountability and efficiency of marketing spend, with a strong demand for clear, measurable ROI to justify expenditures. Marketing and finance often do not have equivalent KPIs. When marketing teams focus on top-line growth, it can be at odds with the CFO’s profitable growth imperative.

Chief CFO beliefs include:

- Marketing has a wide scope of activity, making it hard to define financial accountability.
- Managing cost and profitability is the biggest focus area between the CFO and marketing.
- Marketing dollar investments must have a clear and directly quantifiable impact on revenue and growth.

Results from the 2024 Gartner Marketing Analytics and Technology Survey offer insights into four common characteristics that existed in marketing teams led by senior marketing leaders who said they were able to prove marketing’s value and receive credit for it from stakeholders.

## Focus on Marketing’s Long-Term, Holistic Impact

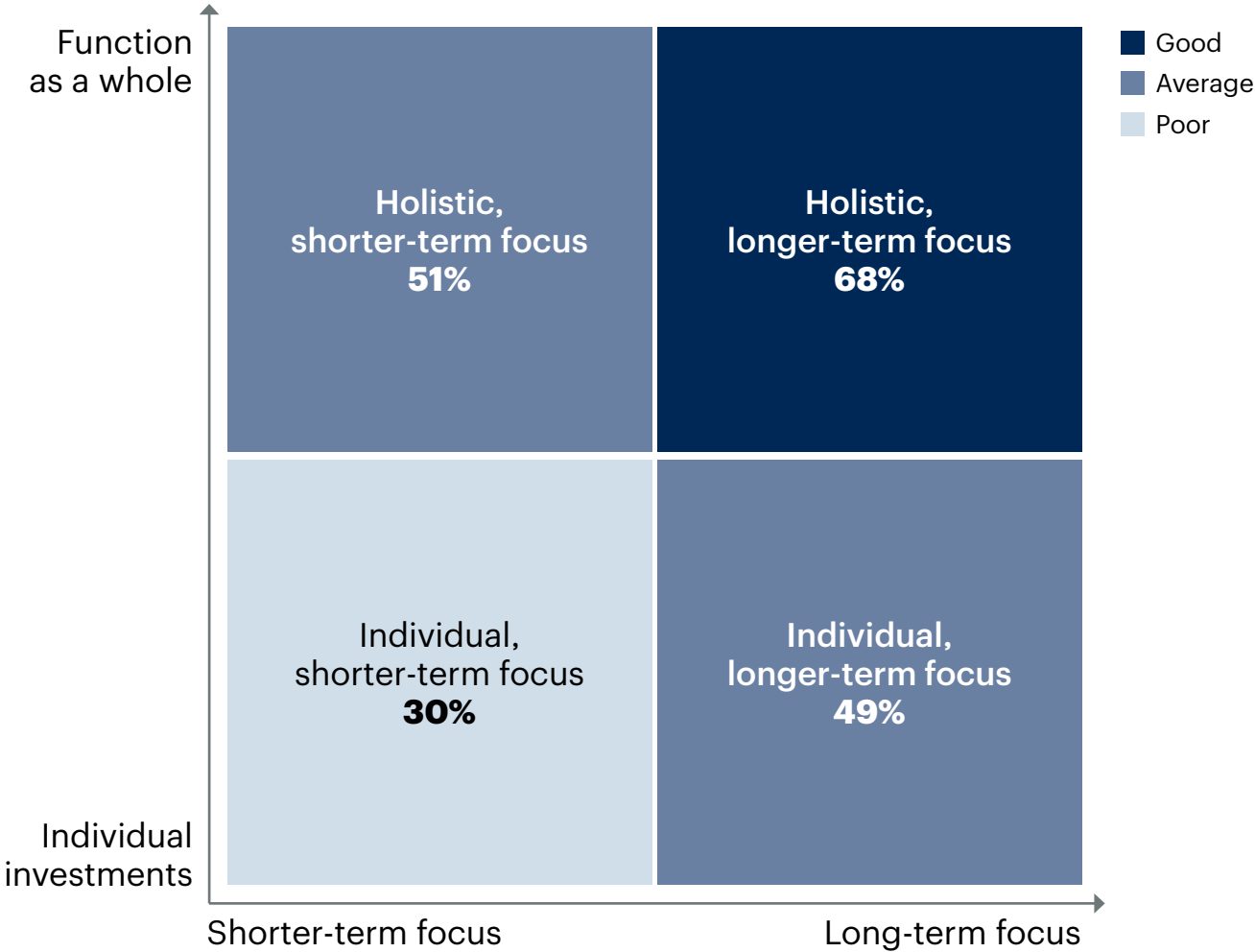
CMOs who communicate marketing’s value through a long-term, holistic view have greater success in proving value and getting credit for it.<sup>1</sup> The survey explored the impact of two critical value story dimensions:

- **Time frame of impact:** Marketing’s value articulated through shorter-term outcomes or longer-term business results
- **Breadth of focus:** Marketing’s value articulated via the impact of individual investments or the value of the function as a whole

The difference in results among value communication approaches is clear (see Figure 2):

- **Focus on shorter-term, individual investments:** Nearly one in four leaders reported using this approach for communicating value, but only one in three of these leaders were able to prove marketing’s value and get credit for business contributions.<sup>1</sup>
- **Focus on shorter-term, holistic view:** This approach was the least common among marketing leaders we surveyed, with only 12% using a shorter-term but holistic view. Only half of these leaders were able to prove value and get credit.<sup>1</sup>
- **Focus on longer-term, individual investments:** Around 20% of marketing leaders reported a longer-term focus on individual investments. Around half were able to prove value and get credit.<sup>1</sup>
- **Longer-term focus, holistic view:** Our data suggests that this approach is both the most common and most successful approach. Of the 41% of leaders who used this approach, over two-thirds reported they were able to prove marketing’s value and get credit.<sup>1</sup>

» **Figure 2. Focus on Marketing’s Holistic, Long-Term Impact**  
Percentage able to prove marketing’s value and get credit for business outcomes



n = 377 senior marketing leaders  
Q. For each pair of statements below, please select the statement that best describes how you approach communicating the value of marketing at your company  
Source: 2024 Gartner Marketing Analytics and Technology Survey

Marketing teams have an imperative to strive for a wider perspective of value across marketing’s contributions, over longer time scales. Taking a wider perspective of value can mean measuring marketing’s effect across other functions, such as sales, customer experience and operations.

CMOs must consider the risk of aiming only for long-term value storytelling to the detriment of short-term agility and proof. Organizations operate at more than one “speed,” and marketing’s role in responding to near-term market dynamics cannot be ignored.

These two dimensions of breadth and time present unique challenges:

**Longer-term value measurement:** The strategic impact of marketing over longer time frames requires specific, sometimes more advanced approaches to measurement. Invest in brand health measurement progression, as well as measurement approaches such as marketing mix modeling (MMM) that allow a strategic lens on marketing investment and value contribution.

- **Brand health** measurement supports quantifying the influence the brand has across various facets of the organization. There are many methods, including brand surveys and metrics, requiring varying amounts of investment.
- **MMM** supports quantifying marketing’s value over long time periods, as well as strategic scenario planning for investment. Many models incorporate external macroeconomic factors, as well as internal commercial factors to estimate and quantify marketing’s return on investment dynamics.

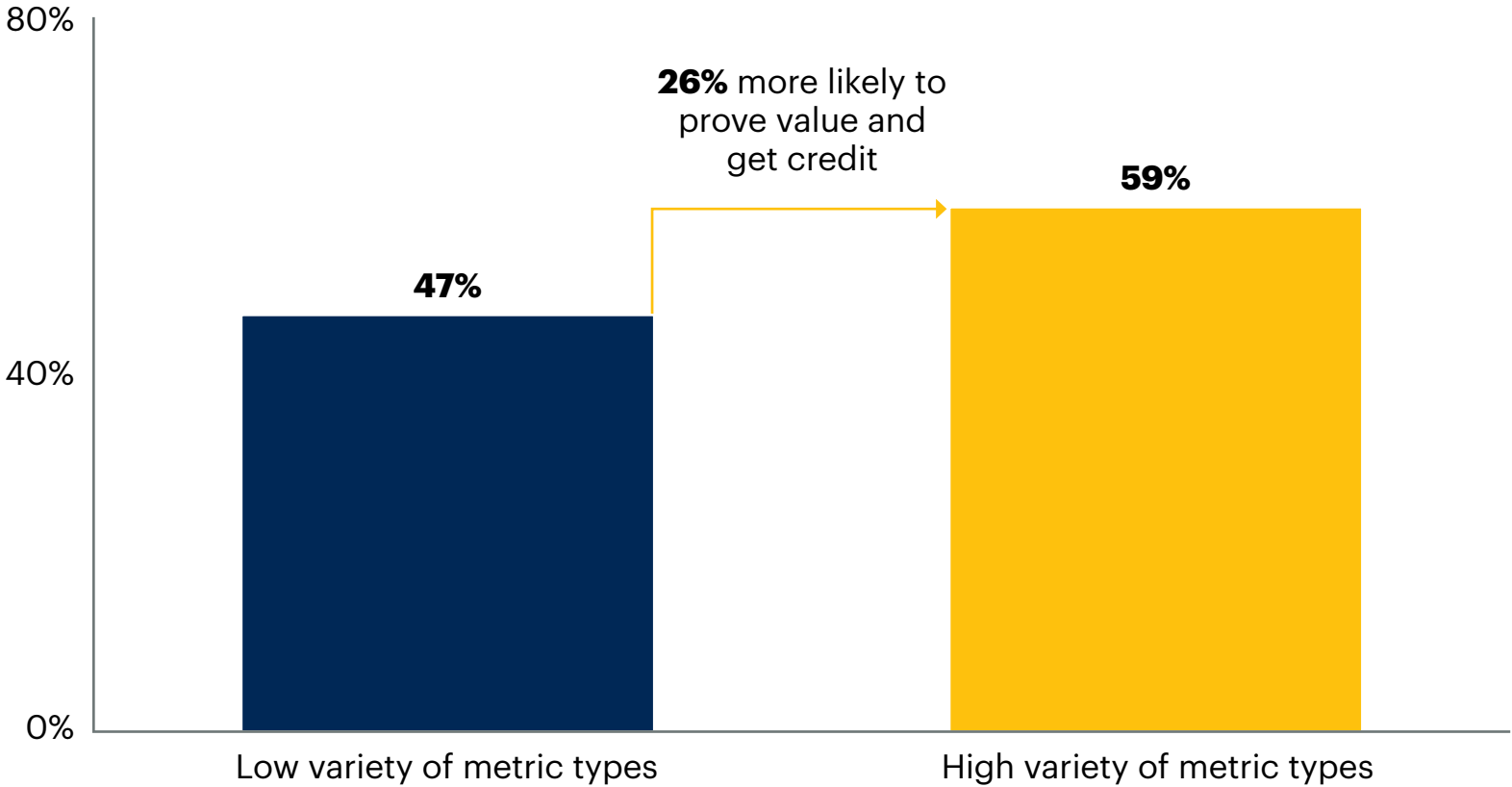
**Holistic breadth of marketing’s contribution to business outcomes:** The measurement and articulation of marketing’s holistic breadth of contribution requires a multifaceted approach that incorporates both careful measurement planning and clear communication.

- **Communicate broad value contribution:** Develop the broader view of marketing’s value contribution across six “value vectors” — connection to strategy; ROI story; critical-project impact; insight engine; empowering others; and optimizing resources.
- **Connect marketing measurement planning to business outcomes:** Map the connections between marketing strategy, business outcomes, goals, KPIs, metrics, segments and dimensions. This connection ensures your measurement planning has a line of sight between top-down strategy and individual data sources.

## Increase Variety and Sophistication of Metric Types

CMOs and their teams can access a vast set of metric types or categories, which can make metrics selection an added challenge. The 2024 Gartner Marketing Analytics and Technology Survey also reveals that leaders who use a greater variety of metric types are 26% more likely to prove marketing’s value and receive credit (see Figure 3).<sup>1</sup>

» **Figure 3. High Metric Type Variety Helps Prove and Get Credit for Marketing’s Value**  
Percentage able to prove marketing’s value and get credit by number of metric types



n = 377 senior marketing leaders  
Q. Which of the following types of metrics do you report when you are communicating the value of marketing at your company?  
Source: 2024 Gartner Marketing Analytics & Technology Survey

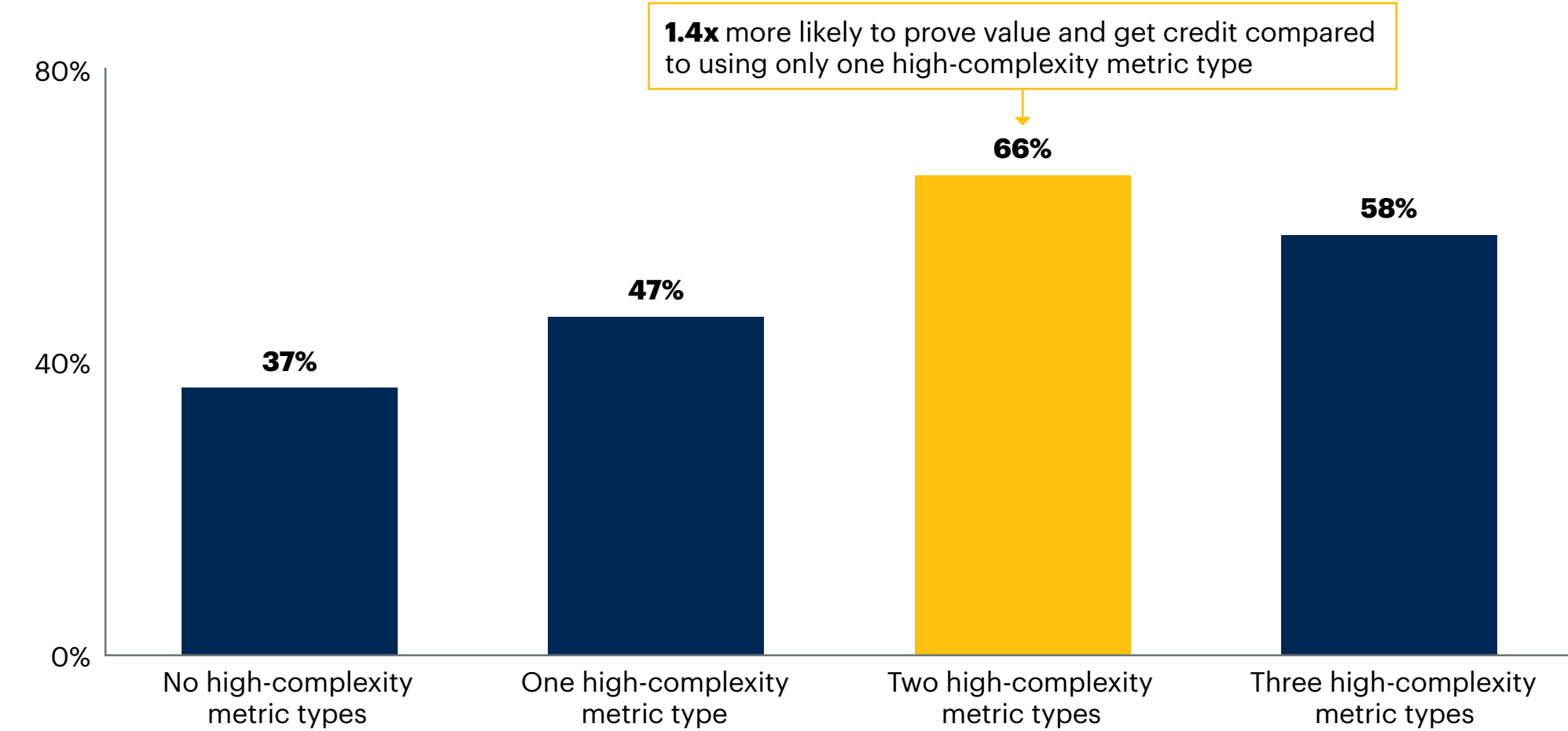


Further analysis reveals that leaders can get more bang for their buck by leveraging more complex metrics to communicate value. CMOs and other senior marketing leaders who incorporated two or more of these “high-complexity” metric types were up to 1.8 times more likely to prove value and get credit than those who used none of them.<sup>1</sup> And only incorporating one high-complexity type isn’t enough — these same CMOs were 1.4 times more likely to prove value and get credit than those who incorporated just one (see Figure 4).

The following metric types were classified as high complexity in the survey:

- **Relationship metrics:** Customer lifetime value (LTV), customer acquisition cost (CAC), LTV:CAC ratio
- **Return on transactional metrics:** Cost per acquisition (CPA), return on ad spend (ROAS), return on investment (ROI)
- **Operational metrics:** Stakeholder satisfaction with deliverables, productivity of marketing resources, percentage of expected capacity utilization

» **Figure 4. Two Complex Metric Types Is Best to Prove Value, Get Credit**  
Percentage able to prove marketing’s value and get credit by number of high complexity metric types



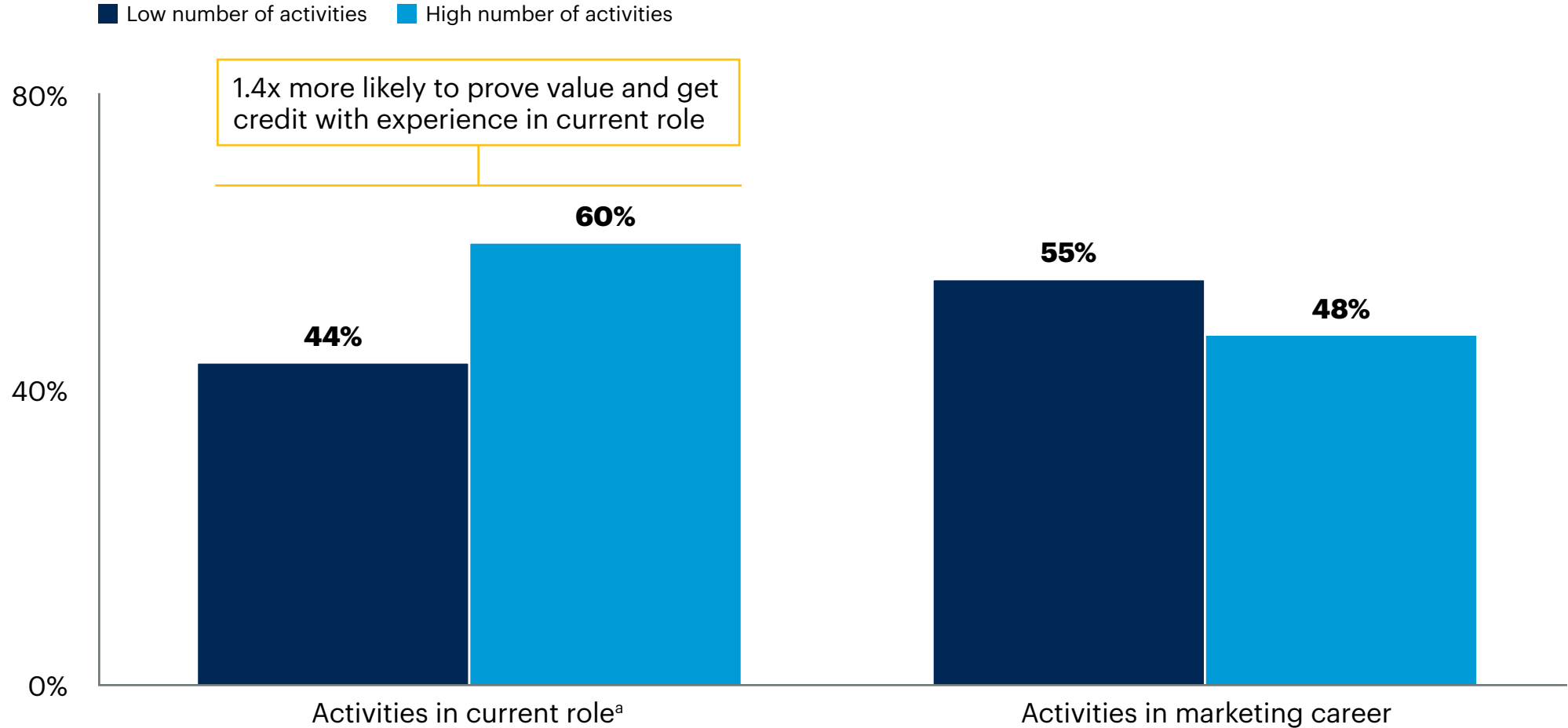
n = 377 senior marketing leaders  
Q. Which of the following types of metrics do you report when you are communicating the value of marketing at your company?  
Source: 2024 Gartner Marketing Analytics and Technology Survey  
Note: High complexity metric types include “Relationship metrics,” “return on transactional metrics,” and “Operational metrics.”

## Expand Leadership Involvement in Data and Analytics Activity

The survey reveals a statistically significant impact on proving marketing value and getting credit when leaders participated in a high number of data and analytics (D&A) activities.<sup>1</sup> Sixty percent of CMOs and other senior marketing leaders who conducted a high number of D&A activities in their current role were able to prove value and get credit. Only 44% of those who conducted a low number of D&A activities could do the same (see Figure 6). However, we don't see the same impact for analytics involvement in leaders' prior careers, suggesting that organizational context and institutional knowledge are the key.<sup>1</sup> The survey defined analytics activities as:

- Managing a team of marketing data analysts
- Creating a marketing dashboard
- Building a custom report from raw marketing data
- Developing a measurement strategy for marketing activities
- Synthesizing quantitative data to inform marketing strategies or tactics

» **Figure 5. Data and Analytics Experience Helps Prove Value and Gain Credit**  
Percentage able to prove marketing's value and get credit by data and analytics experience



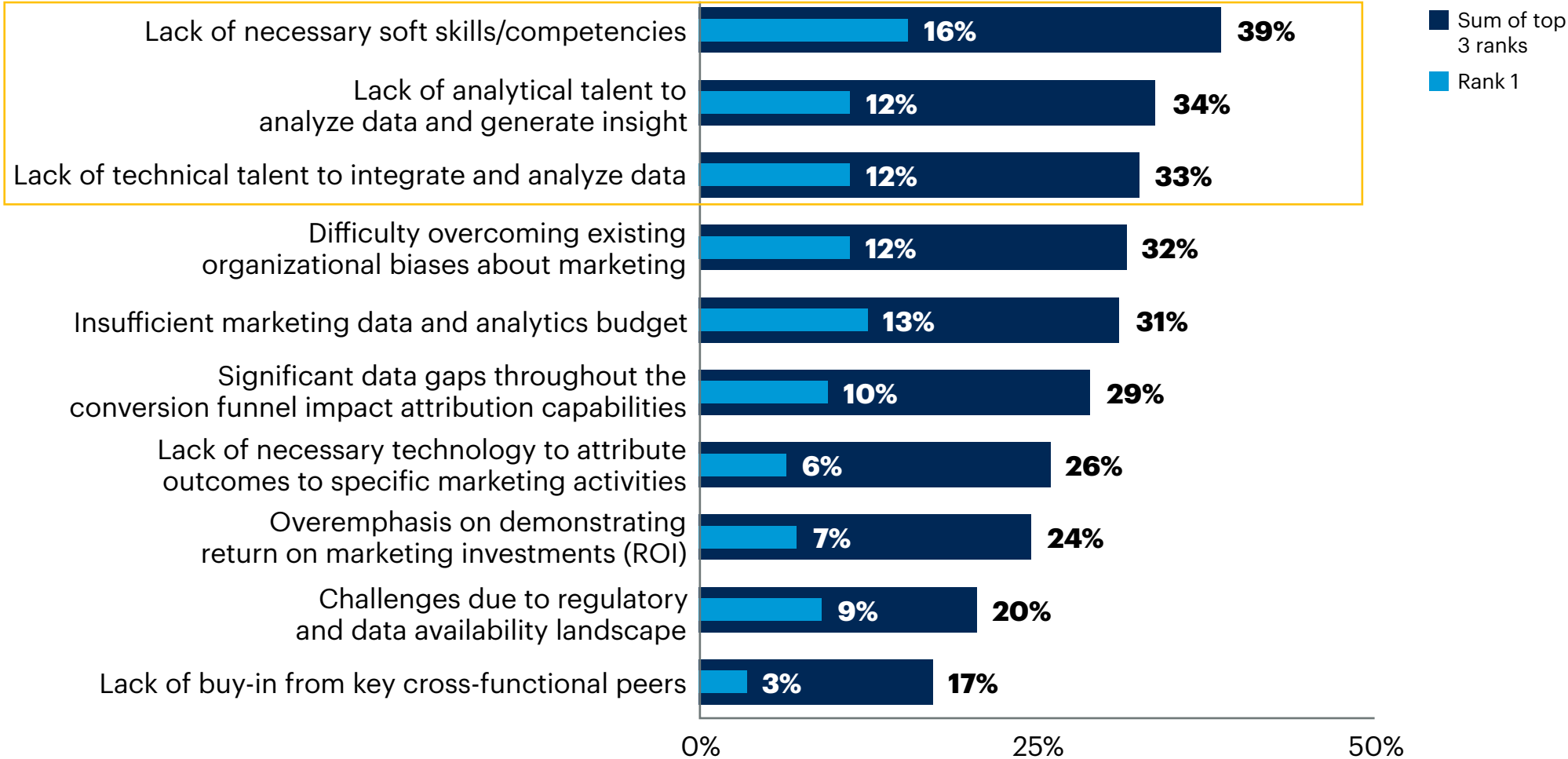
n = 377 senior marketing leaders  
Q. Which of the following activities have you personally executed either in your current role or during your marketing career?  
Source: 2024 Gartner Marketing Analytics and Technology Survey  
<sup>a</sup> Denotes statistically significant difference between groups.

Invest in Marketing Talent to Close Gaps

The survey also reveals that the three biggest barriers to proving marketing’s value are talent related, which upends the conventional view that proving marketing’s value is a fully D&A-driven pursuit. Seventy-two percent of respondents selected at least one of the talent-related barriers (see Figure 6).

Without the right talent, skills and competencies, the perception of marketing’s value among the C-suite is negatively impacted.

» Figure 6. Talent Gaps Top List of Barriers to Proving Marketing’s Value  
Top choice and sum of top 3 ranks



n = 372 senior marketing leaders; excluding don't know/none of these  
Q. Which of the following are the biggest barriers to proving the value of marketing at your company?  
Source: 2024 Gartner Marketing Analytics and Technology Survey

CMOs must address these talent-related barriers to successfully prove marketing’s value and secure the recognition and investment it deserves. By enhancing soft skills, bridging the analytical talent gap and strengthening technical expertise, CMOs can transform the marketing function into a powerhouse of strategic insights and impactful storytelling.

- **Soft skills and competencies:** The lack of necessary soft skills and competencies topped the list of barriers, with 39% of respondents listing it in the top three.<sup>1</sup> Marketing leaders must tell the story consistently and credibly, explaining how marketing creates value in a way that leads to well-informed decision making.
- **Analytical talent:** More than one-third (34%) of survey respondents cited lack of analytical talent as one of the biggest barriers to proving marketing’s value.<sup>1</sup> Investing in continuous training and development can help bridge the analytical talent gap and enhance decision-making capabilities.
- **Technical talent:** One-third of survey respondents cited a lack of technical talent as a significant barrier.<sup>1</sup> CMOs must focus on recruiting and upskilling technical talent capable of leveraging advanced marketing technologies, a critical foundation to marketing’s ability to show value, both through martech utilization and data availability.

<sup>1</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). 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.



# Chief Marketing Officer Leadership Vision 2025

Now in 2025, with marketing required to do more with less, CMOs must focus on delivering transformative change rather than settling for incremental progress.

Download the Gartner CMO Leadership Vision for 2025 to discover:

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- » Top priorities for the coming year
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