



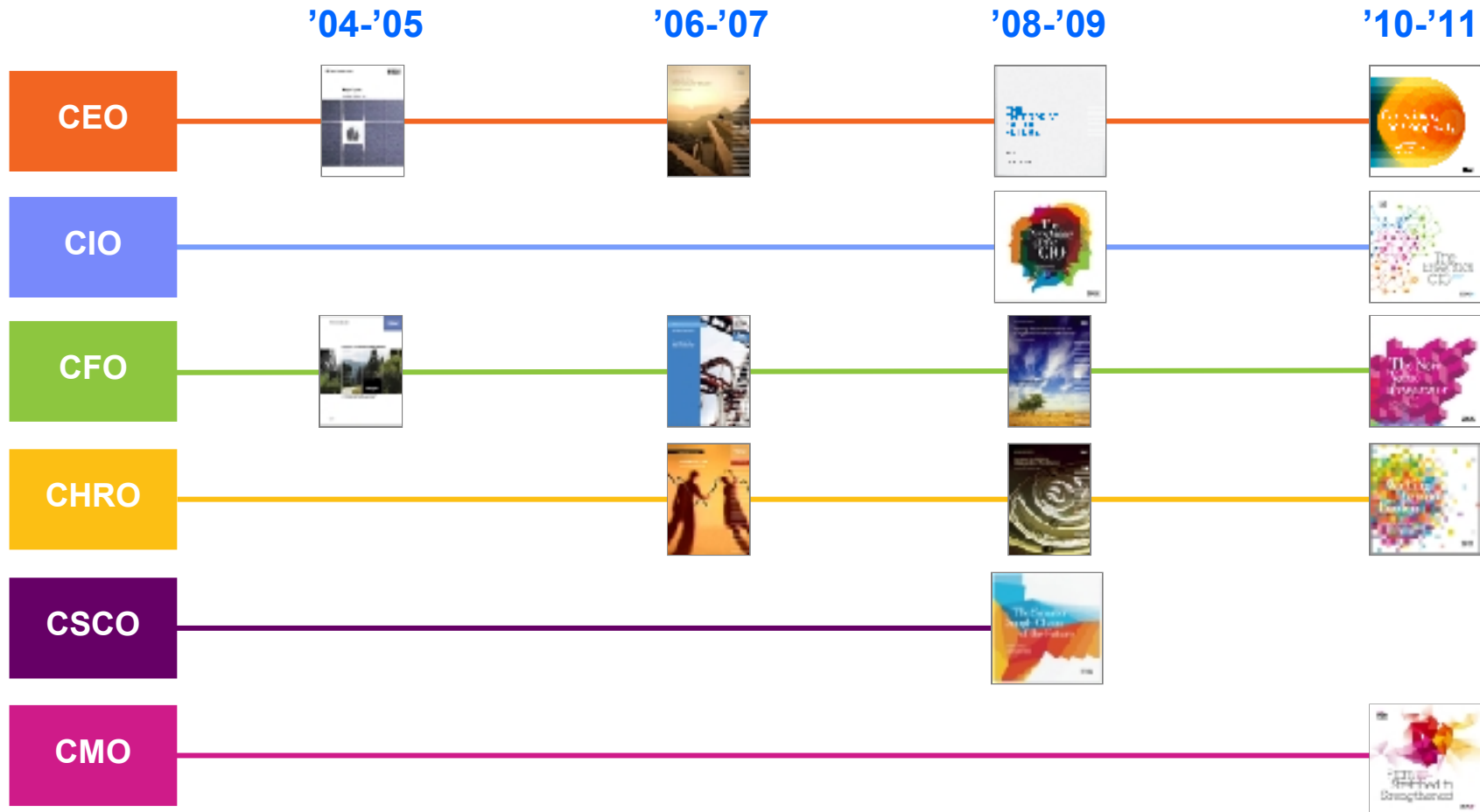
From Stretched to Strengthened

Insights from the
Global Chief Marketing
Officer Study

Automotive
Point of View

CMO
C-suite
Studies

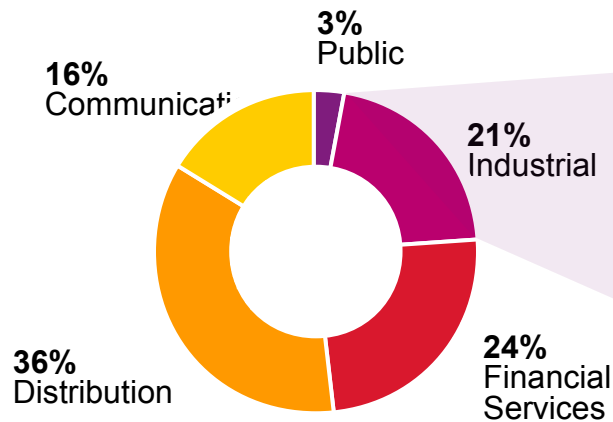
The 2011 Global CMO Study is part of our C-suite Study series encompassing interviews with more than 15,000 C-suite executives



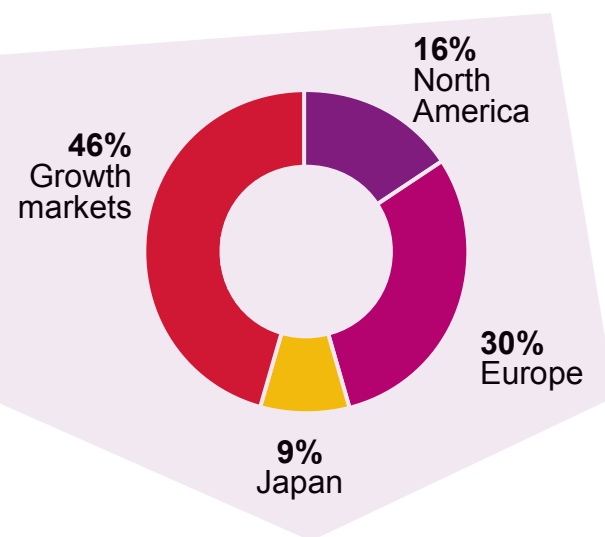
We conducted 70 face-to-face interviews with senior Marketing executives across the Automotive industry

This is the largest sample of face-to-face CMO interviews as we spoke with more than 1,700 executives...

Global Sector Breakdown



Automotive Breakdown



...Automotive interviews are a subset of Industrial

Growth Markets include Latin America, Central and Eastern Europe, Middle East and Africa and Asia Pacific (excluding Japan); n=70

Through these in-depth discussions, we are better able to understand the evolving role and function of the CMO in the C-suite

Scope	Approach	Analysis
<ul style="list-style-type: none"> ▪ Sample consists of private sector CMOs (97%) and public sector leaders (3%) ▪ Representative sample across 64 nations and 19 industries ▪ Private sector organizations with revenue more than US\$500 million in mature markets and more than US\$250 million in growth markets; public sector organizations with more than 1,000 employees 	<ul style="list-style-type: none"> ▪ Face-to-face one hour interviews with 1,734 CMOs, 70 of which were in the Auto industry ▪ Facilitated using structured questionnaire ▪ Wide coverage: from highly profiled organizations (48 of the 100 top Interbrand organizations) to lower profile local organizations 	<ul style="list-style-type: none"> ▪ Statistical analysis of 35 questions and the related 236 discrete factors ▪ In-depth analysis based on self-reported performance characteristics for differences between “outperformers” and “underperformers” ▪ Comprehensive review and analysis of more than 10,000 interview quotes

Marketing in the Digital Era

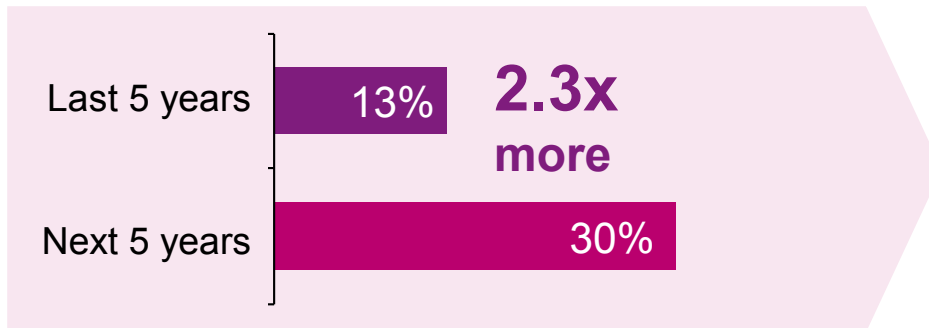
- Deliver value to empowered customers
- Foster lasting connections
- Capture value, measure results

Note: Outperformers and underperformers were identified by answers to questions about their organization's competitive position. Those who selected “significantly outperform industry peers” were identified as outperformers; those who selected “somewhat or significantly underperform industry peers” were grouped as underperformers.

Automotive CEOs expect a dramatic change in their future business

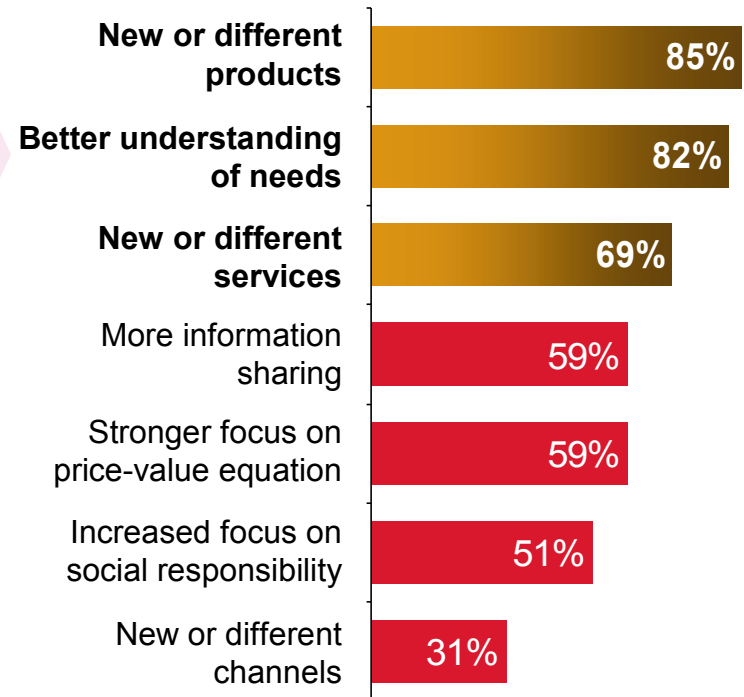
From our recent Global CEO study...

What % of revenue will come from new sources, such as new products, services or markets?



...marketing organizations will have a **substantial role** in attaining these goals

Where will customer expectations change to the greatest extent?



Source: 2010 Global CEO Study, automotive industry analysis.

The passion for vehicles remains strong, however, the connection point with consumers is rapidly changing across the auto industry

Today's abstract connection with consumers will **become very direct**...



12 of top 100
Brands on the Interbrand 100 list, only Financial Services and Electronics has more than Auto



5 of top 12
Automakers represent the most popular brands on Facebook



Digital Explosion in connected cars

By 2016, there may be more than 210M connected cars in developed markets



Automotive as leading connectivity platform

By 2014, vehicles will be the fastest growing connected-device platform for internet-based content



In-car infotainment is commonplace

By 2016, there will be 150M In-car internet users & 30M internet radio users in USA



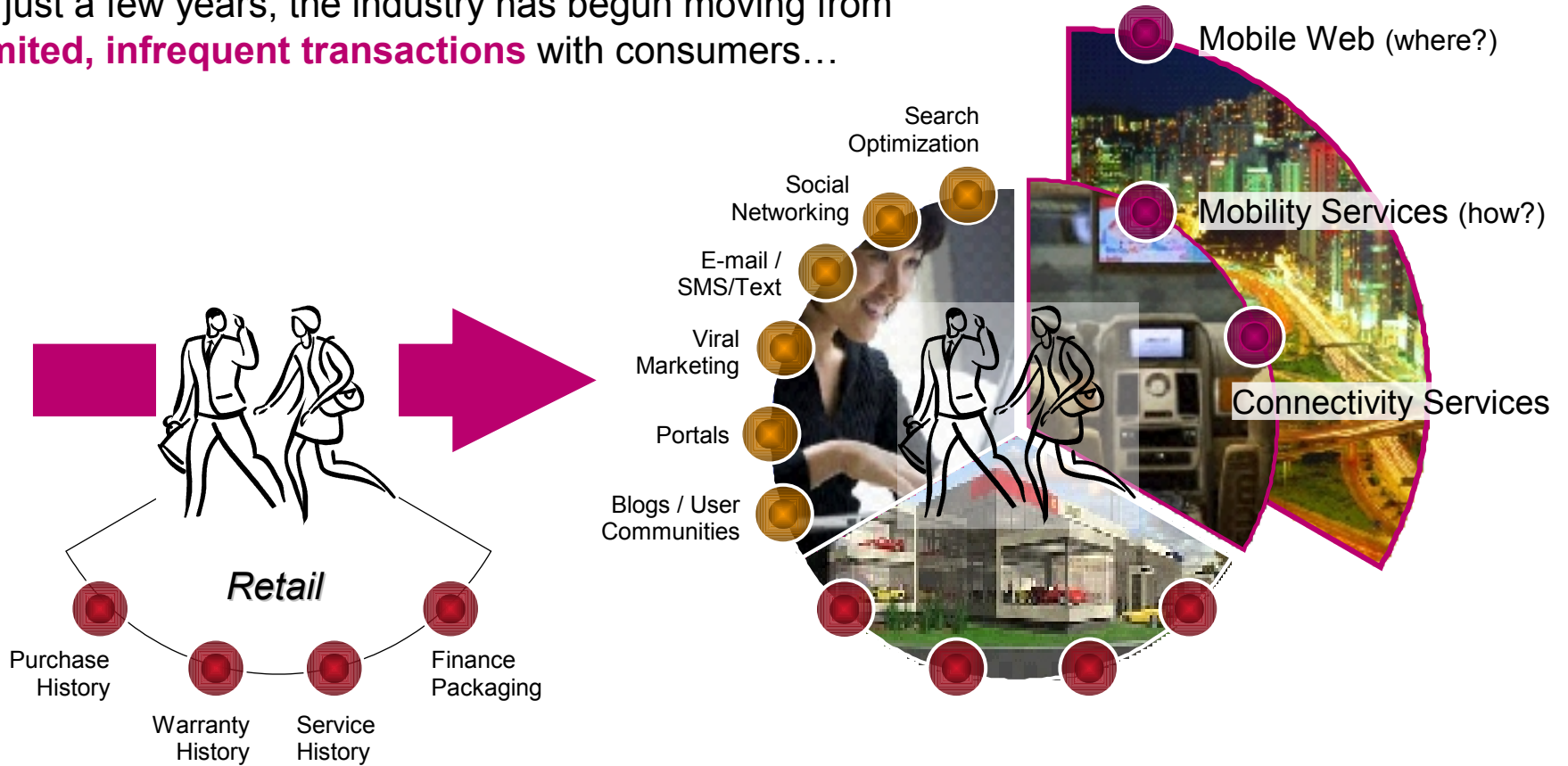
Connected car app users accelerating 40 fold

By 2016, there will be over 129M users of Smartphone applications in cars

Source: Interbrand Top 100 Brands, 2011. Facebook, 2010.

The ability to collect and synthesize vast data about customers, how they use vehicles and how they need to move around is upon automakers

In just a few years, the industry has begun moving from **limited, infrequent transactions** with consumers...



...to a rapidly developing network of information enabling auto companies to **know and understand their customers in new ways**

Marketing organizations have a unique opportunity to help drive the innovation that automakers will need in the coming years



How can we get **closer to consumers?**



How will we **profit from investments** in vehicle connectivity?



What are the keys to developing **successful mobility services?**

“We want to keep ourselves differentiated in the market through our products (car and service) as well as communication”

– CMO, Emerging Market OEM

Agenda

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- Focus on the relationship, not just the transaction
- Invest in building your corporate character

Capture value, measure results

- Demonstrate accountability through ROI
- Recognize shift towards new skills and capabilities

The CMO Agenda – Get fit for the future



CMOs: swimming, treading water or drowning?

In this Digital Era...

- Globalization has brought the world to everyone's backyard
- Everyone is a broadcaster, publisher and a critic: there is nowhere to hide
- Transparency is the new price of entry

And...
more data, more sources,
less clarity

CMOs: swimming, treading water or drowning?

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CMOs have to...

- Do more than ever, inside and outside the organization
- Be more accountable for return on investment (ROI)
- Use tools and technologies that their children understand better than they do

And...
CMOs have just three to four years
to make their mark

Many CMOs feel unprepared for the amount of complexity they are facing in a rapidly changing marketplace

Expected level of complexity and preparedness to handle *Percent of CMOs responding*

85%

Expect high/very high level of complexity over 5 years

62%

Feel prepared for expected complexity

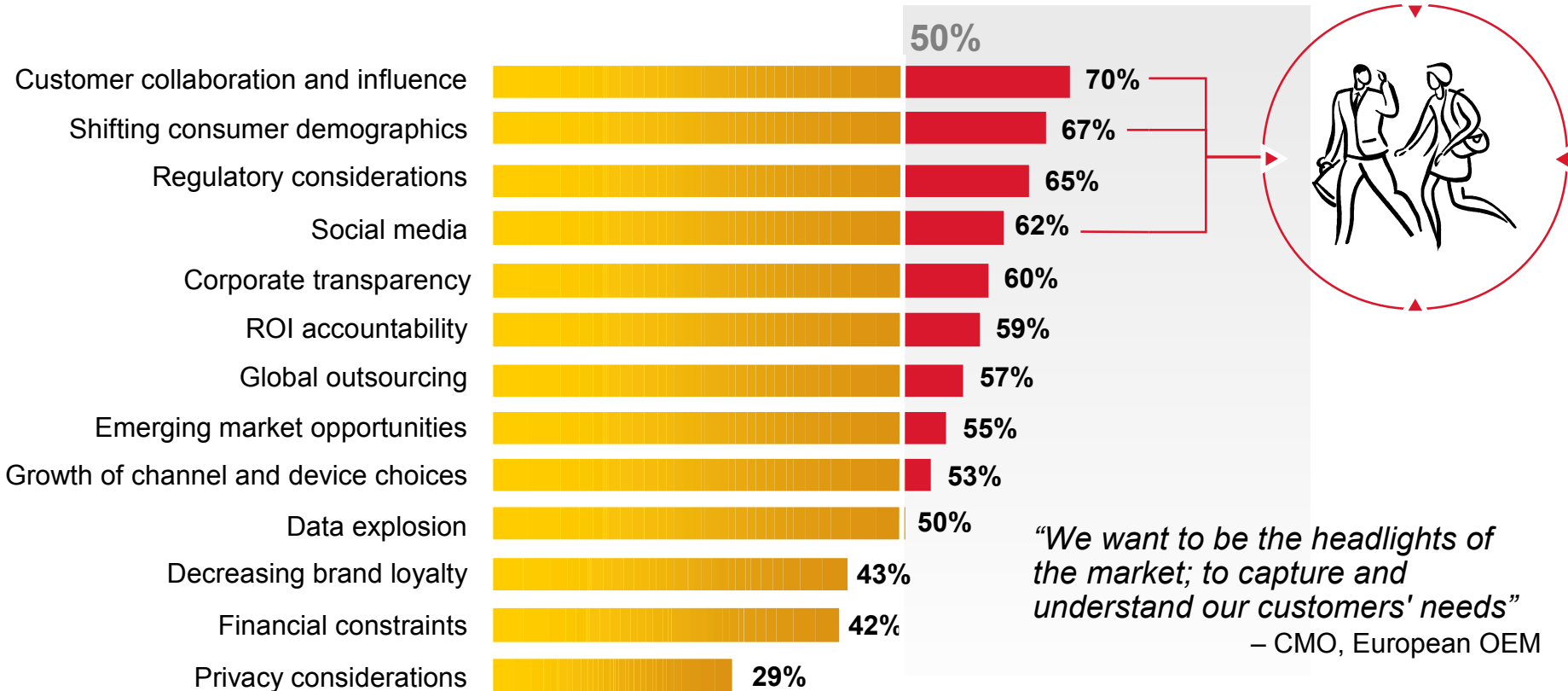
23%
complexity gap



Automotive CMOs are particularly underprepared to manage the impact of key changes in marketing that get closer to consumers

Underpreparedness

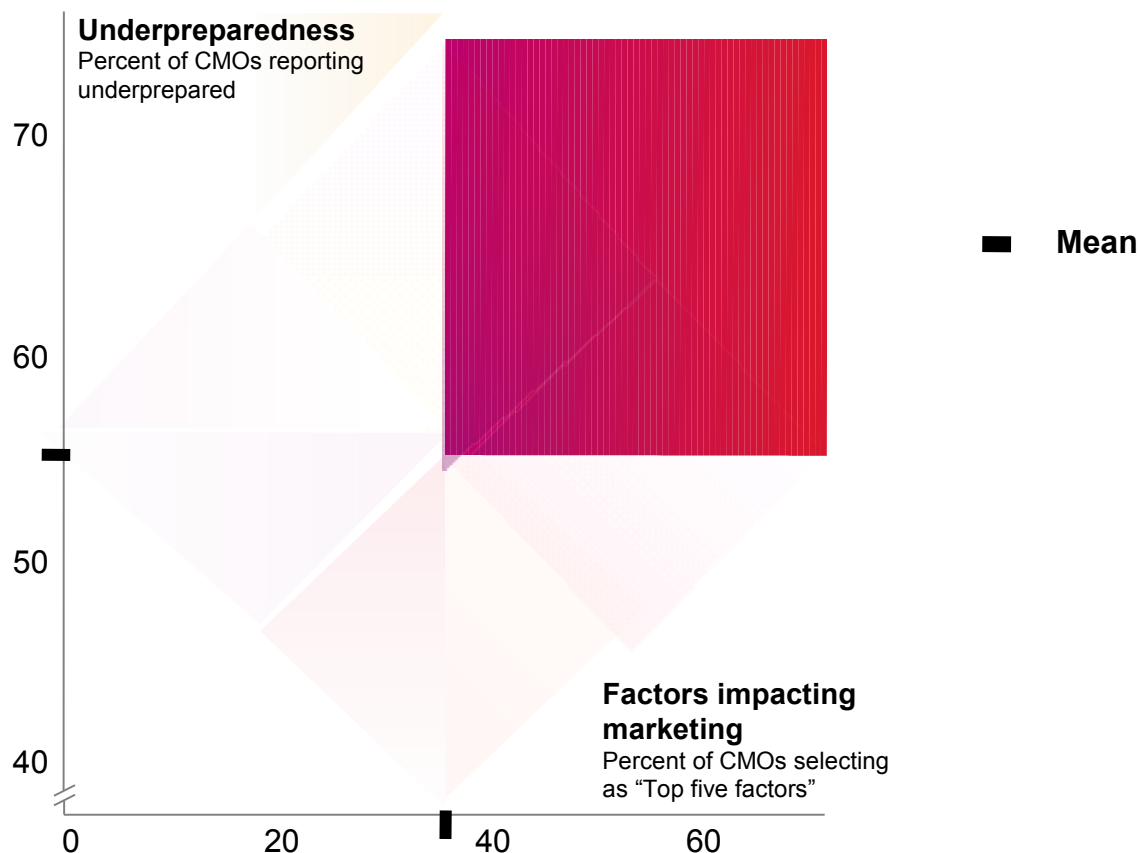
Percent of CMOs reporting underpreparedness



Source: Q8 How prepared are you to manage the impact of the top 5 market factors that will have the most impact on your marketing organization over the next 3 to 5 years?
 n=5 to 43 (n = number of respondents who selected the factor as important)

We wanted to understand which underprepared areas are the most critical for CMOs

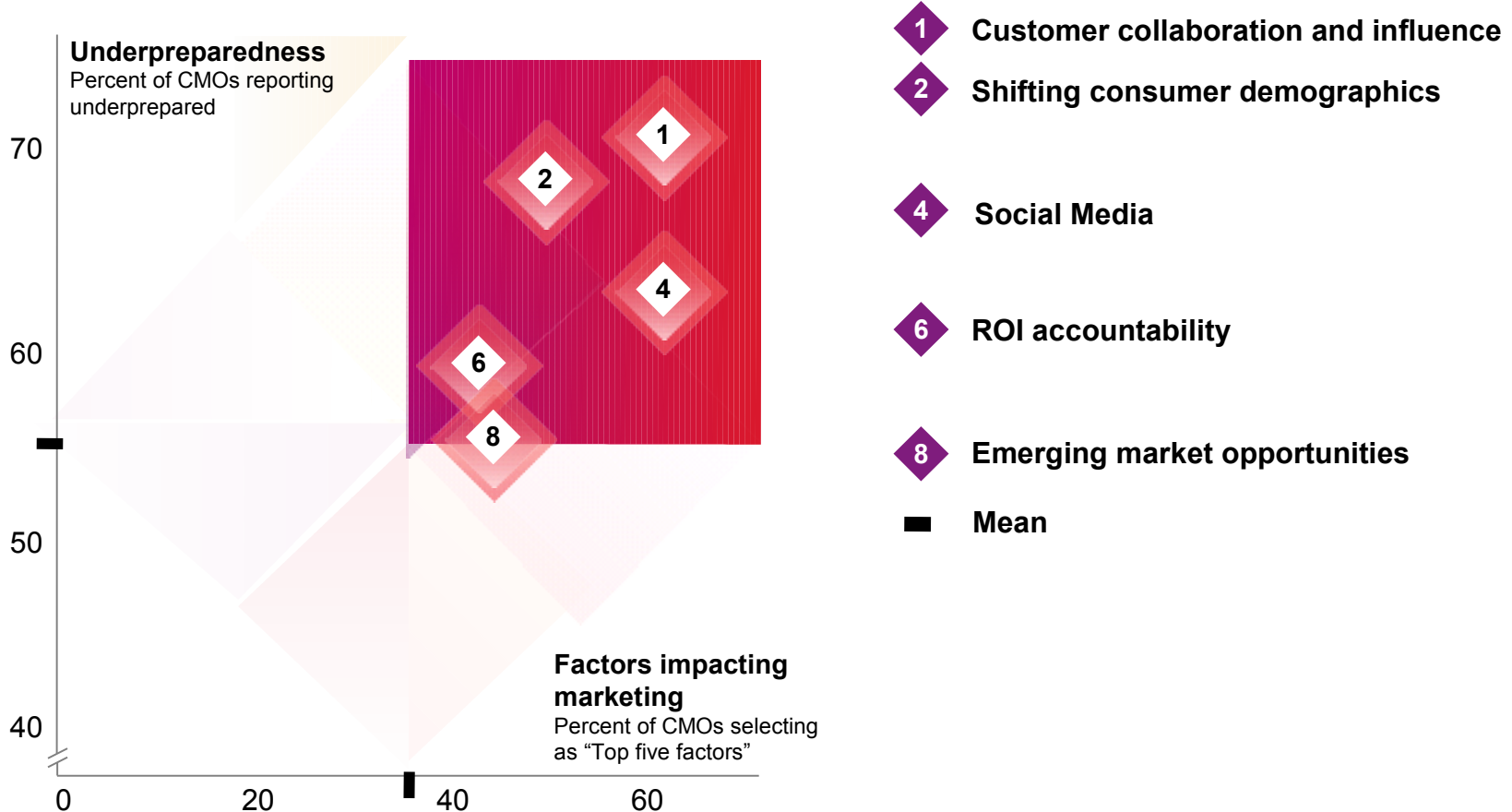
Marketing Priority Matrix



Source: Q7 Which of the following market factors will have the most impact on your marketing organization over the next 3 to 5 years? n1=1733; Q8 How prepared are you to manage the impact of the top 5 market factors that will have the most impact on your marketing organization over the next 3 to 5 years? n2=149 to 1141 (n2 = number of respondents who selected the factor as important in Q7)

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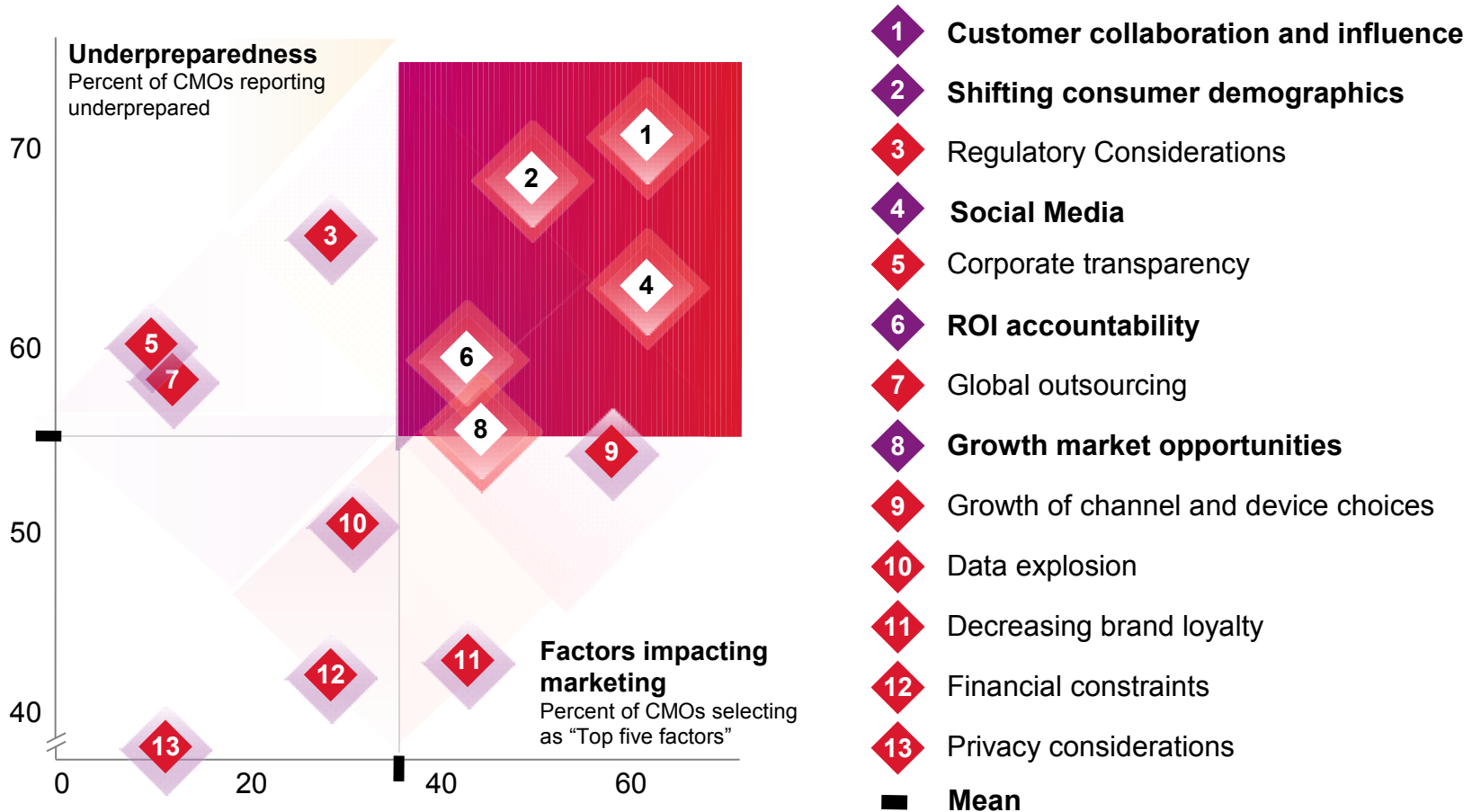
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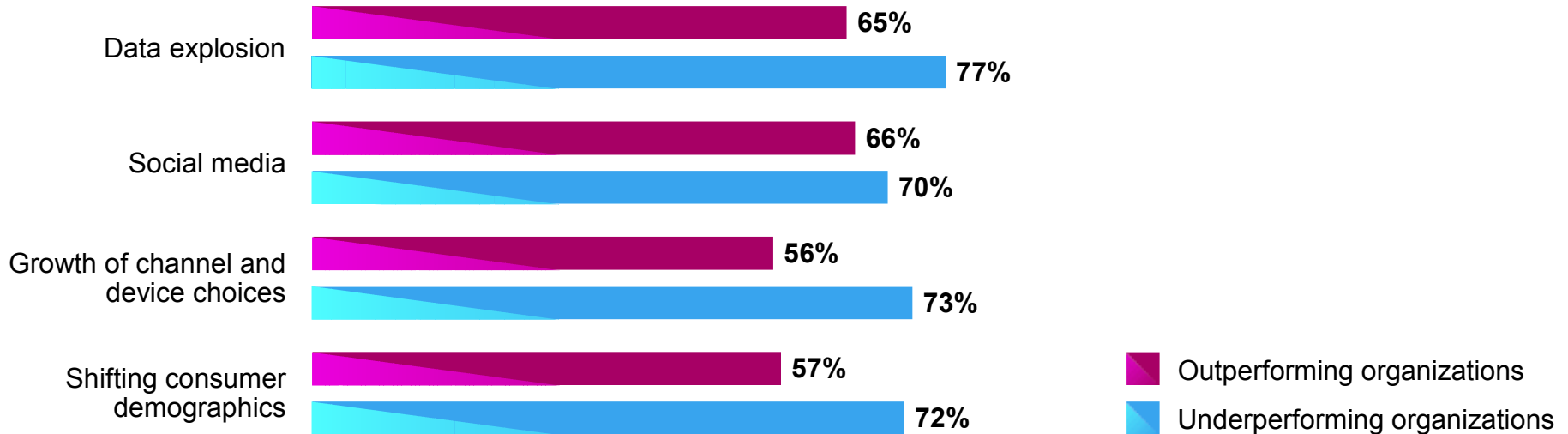
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Outperformers are battling almost as much as underperformers to deal with the four most critical pain points

Level of underpreparedness to manage market factors
Percent of CMOs reporting underpreparedness



Source: Q8 How prepared are you to manage the impact of the top 5 market factors that will have the most impact on your marketing organization over the next 3 to 5 years?
 n outperforming = 45 to 338; n underperforming = 29 to 250

To deal with the broad level of underpreparedness, CMOs signaled three key domains of improvement



“Marketing must become more adept at managing the magnitude of change now taking place. Otherwise, it will be like going into battle with a Swiss Army knife.”

Financial services vice president, marketing, US

Agenda

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- Invest in building your corporate character

Capture value, measure results

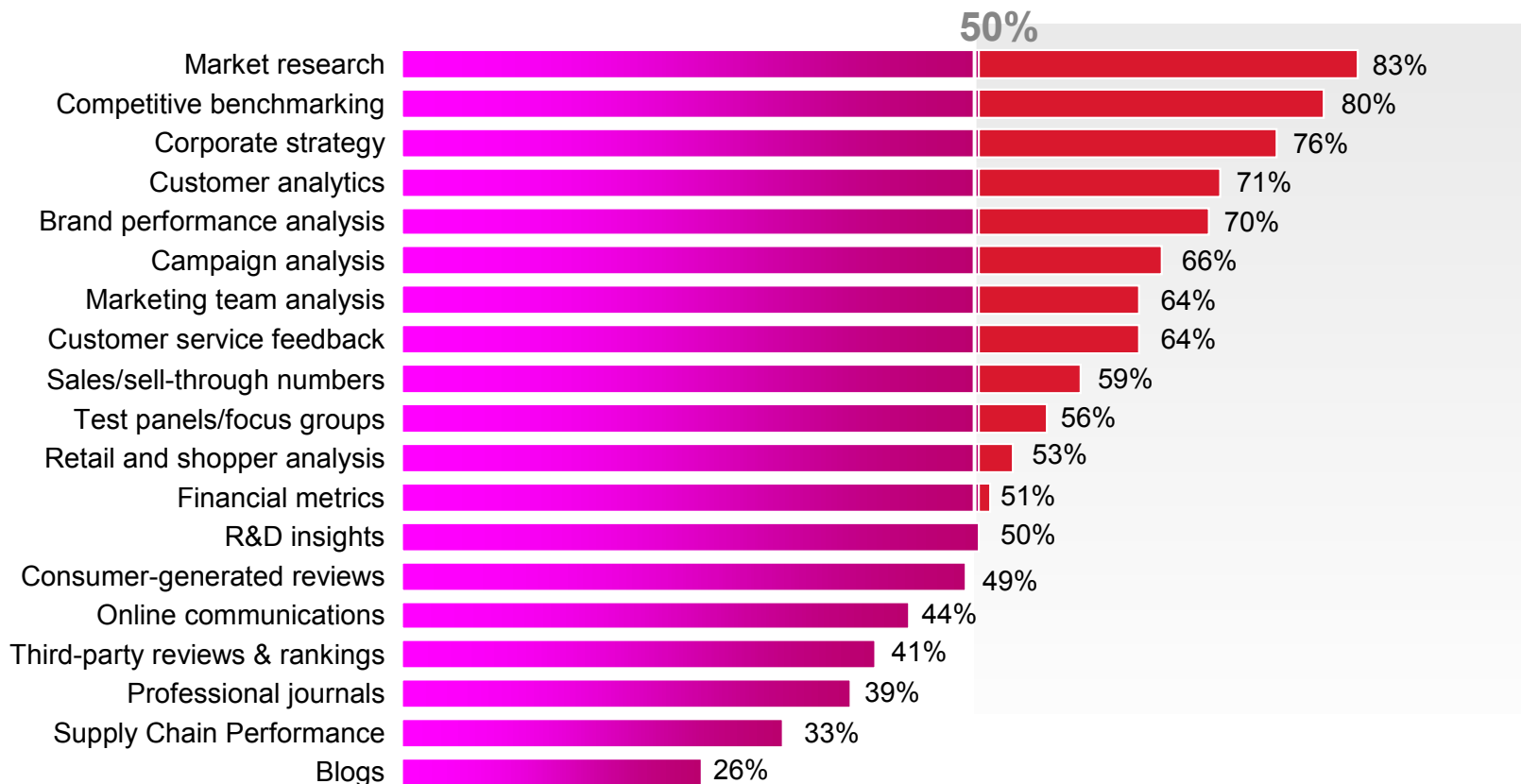
- Demonstrate accountability through ROI
- Recognize shift towards new skills and capabilities

The CMO Agenda – Get fit for the future

Most CMOs are still focusing on understanding *markets* versus understanding *individuals* to shape their strategy

Sources used to influence strategy decisions

Percent of CMOs selecting all sources that apply

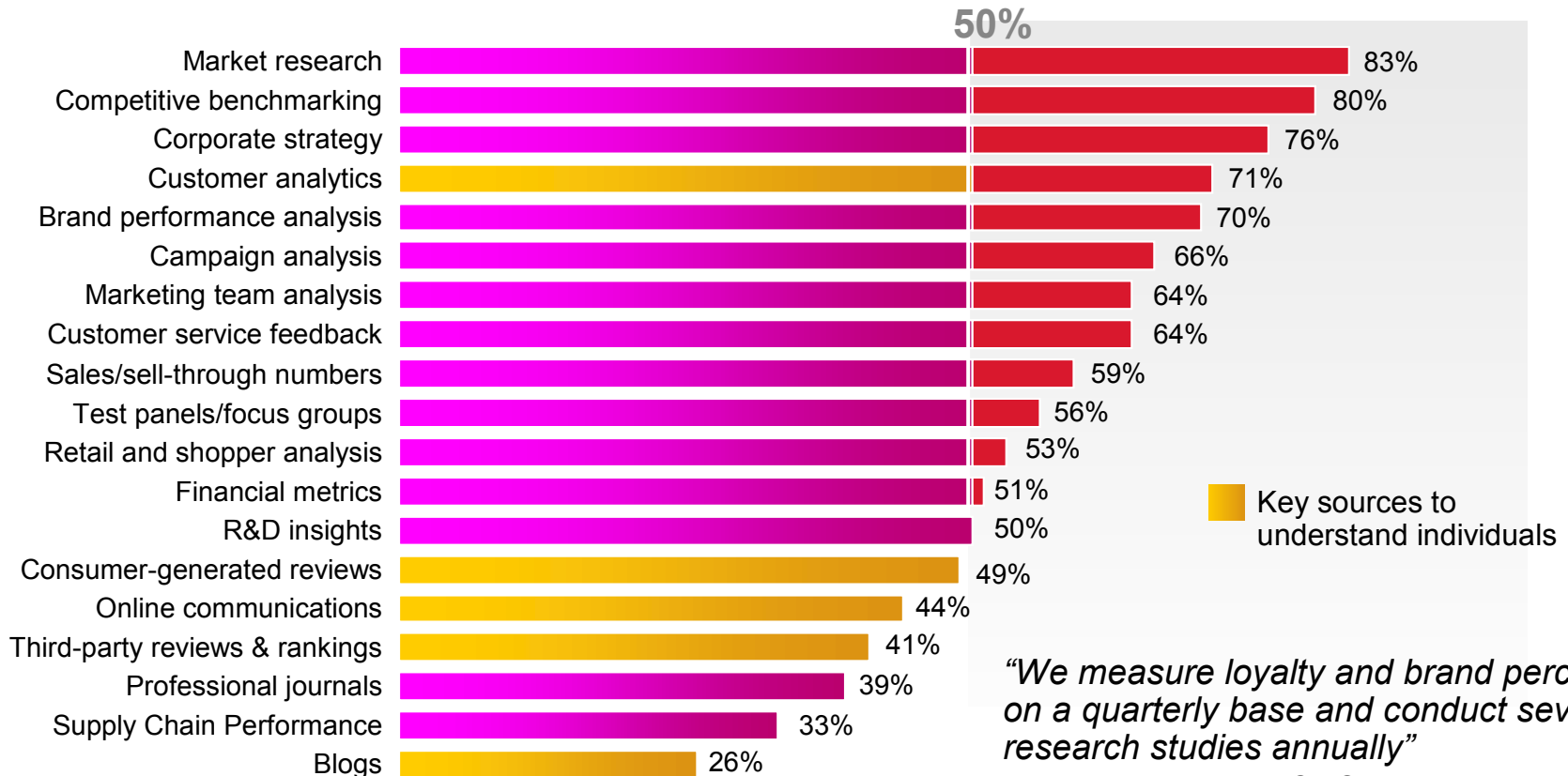


Source: Q15 What sources of information influence your marketing strategy decisions? n=70

Most CMOs are still focusing on understanding *markets* versus understanding *individuals* to shape their strategy

Sources used to influence strategy decisions

Percent of CMOs selecting all sources that apply



“We measure loyalty and brand perception on a quarterly base and conduct several research studies annually”

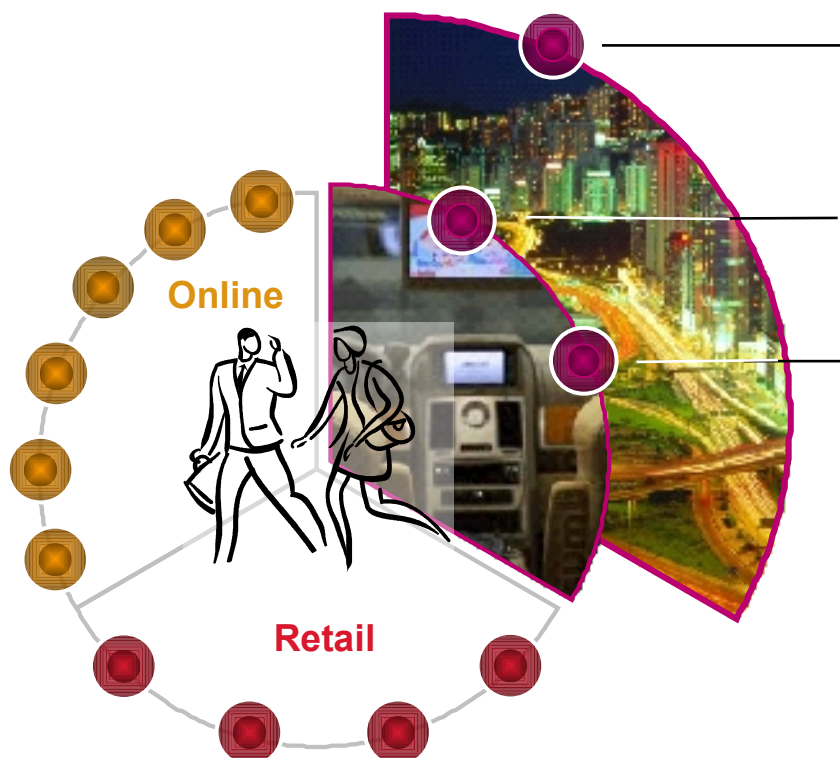
– CMO, Emerging Market OEM

Source: Q15 What sources of information influence your marketing strategy decisions? n=70

Understanding individuals will require significant data generated within vehicles as well as location-based information outside the vehicle

“Five percent of cars are connected today, three to five years from now, 100 percent will be connected”

– Glenn Lurie, President, AT&T Emerging Devices Division
New York Times, October 13, 2011



Mobile Web (where to go)

- Transportation and location-based services driven from smart phones outside the vehicle

Mobility Services (how to go)

- Optimizing transportation across multiple modes

Connectivity Services

- All other services supporting drivers and passengers with connectivity while using vehicles

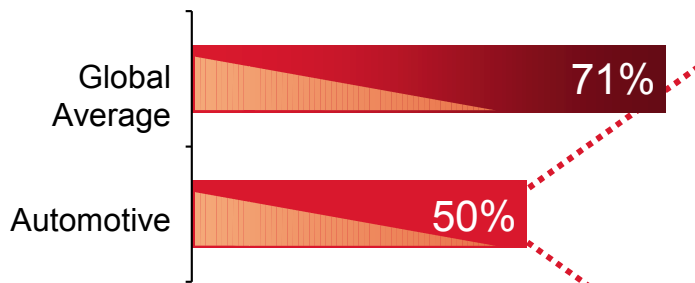
“To recognize the need for new tools and technologies to manage the explosion of data”

– Marketing Director, European OEM

Automotive CMOs are understating their readiness to handle the influx of big data that connected vehicles will generate

Under preparedness

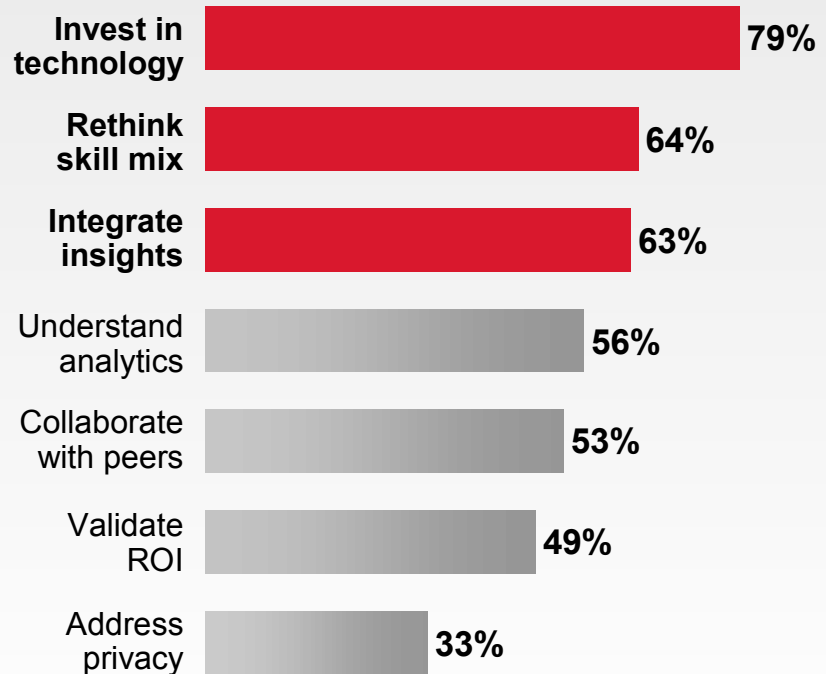
Percent of CMOs selecting as "Top 5 Factors"



- Top ranked factor in global average, while 10th for Automotive
- Auto companies will be the 2nd largest producer of data in the next few years

Need for change to deal with data explosion

Percent of CMOs indicating high/significant need

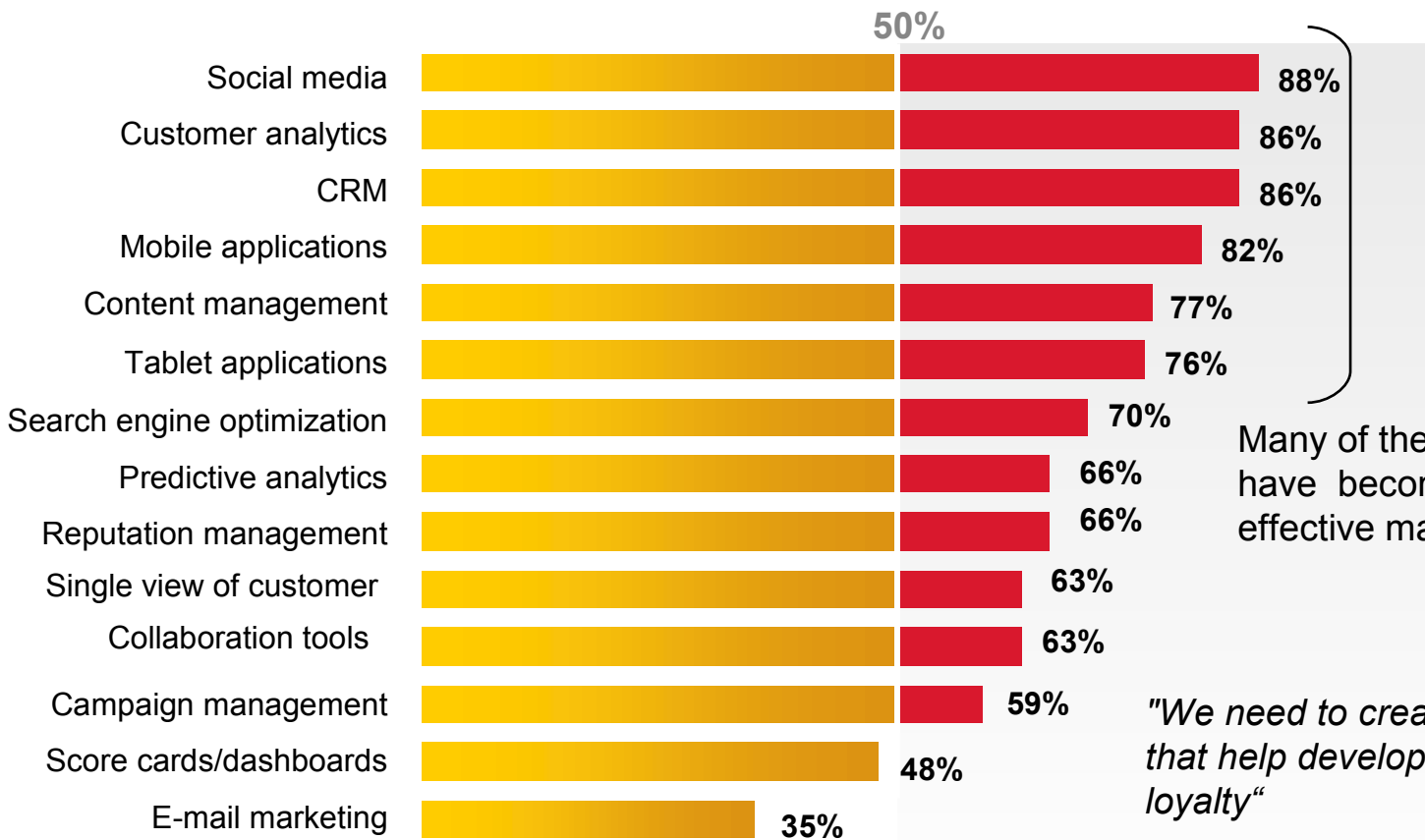


Source: Q8 How prepared are you to manage the impact of the top 5 market factors that will have the most impact on your marketing organization over the next 3 to 5 years? n=5 to 43; Q20 To what extent will the opportunity to collect unprecedented amounts of data require you to change? n=65 to 68

Majority of CMOs are eager to deploy tools and technologies to grapple with growing volume, velocity and variety of data

Plans to increase the use of technology

Percent of CMOs selecting technologies



Many of these technologies have become **table-stakes** in effective marketing execution

"We need to create value propositions that help develop greater brand loyalty"

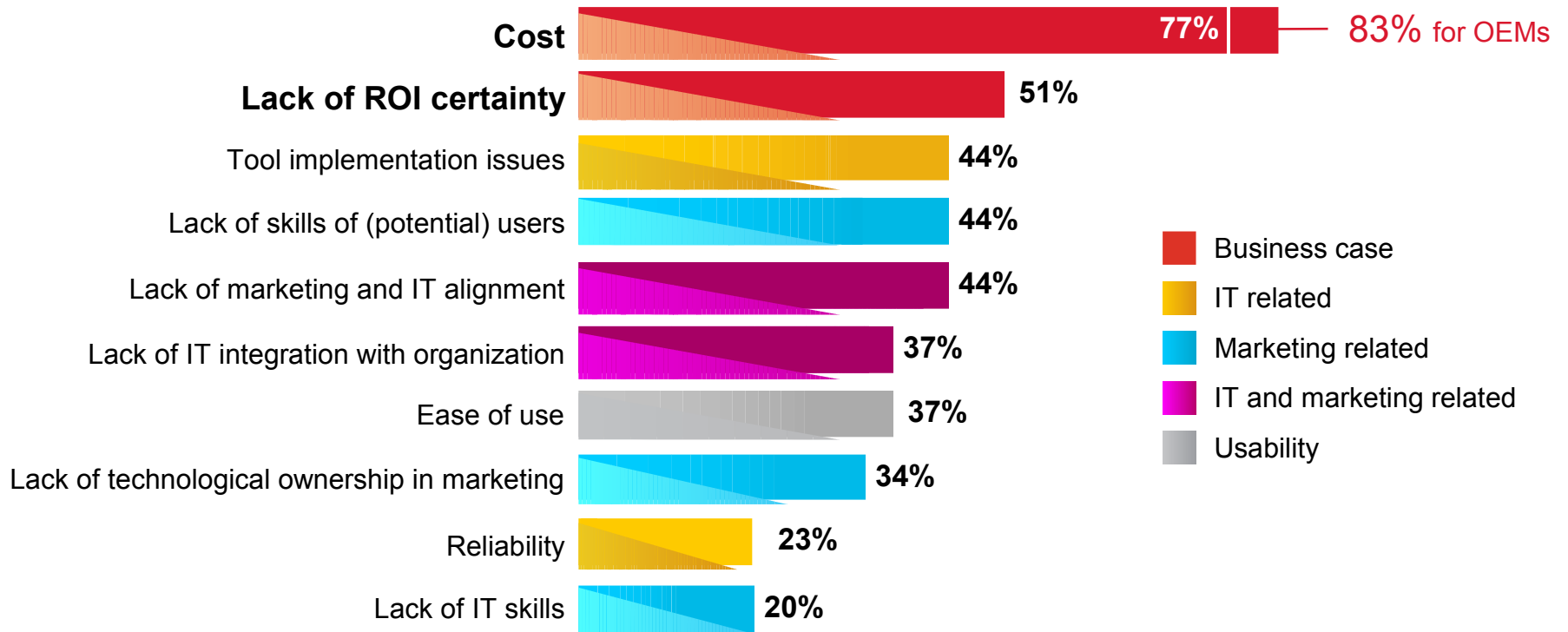
– CMO Truck OEM, USA

Source: Q22 Do you plan to decrease or increase the use of the following technologies over the next 3 to 5 years? n=62 to 66

The cost and business case of technology investment in marketing is by far the greatest barrier for Automotive CMOs

Barriers to using technology in marketing

Top 5 selected by CMOs



“Until recently, we didn’t realize how powerful the impact of social media is in our marketing success”

Source: Q23 What are the top 5 barriers to using technology? n=70

Recommendations and tough questions – Deliver value to empowered customers

Begin with the big business question.

- Focus on the opportunity to create value for customers as individuals.



How are you gearing your marketing people, programs and processes to understand individuals not just markets?

Open the aperture.

- Reprioritize your investments to mine digital channels, such as blogs, tweets, social networks, peer reviews and consumer-generated content, to access customers' honest, unmediated views, values and expectations. Use advanced analytics to recognize preferences, trends and patterns across every touch point.



Which tools and processes are you investing in to better understand and respond to what individual customers are saying and doing?

Safeguard data.

- Work with IT to assess potential data and infrastructure exposures, employ tools to secure customer data and update privacy policies to address customers' concerns.



How do you safeguard your customers' data and privacy in a multi-channel, multi-device world?

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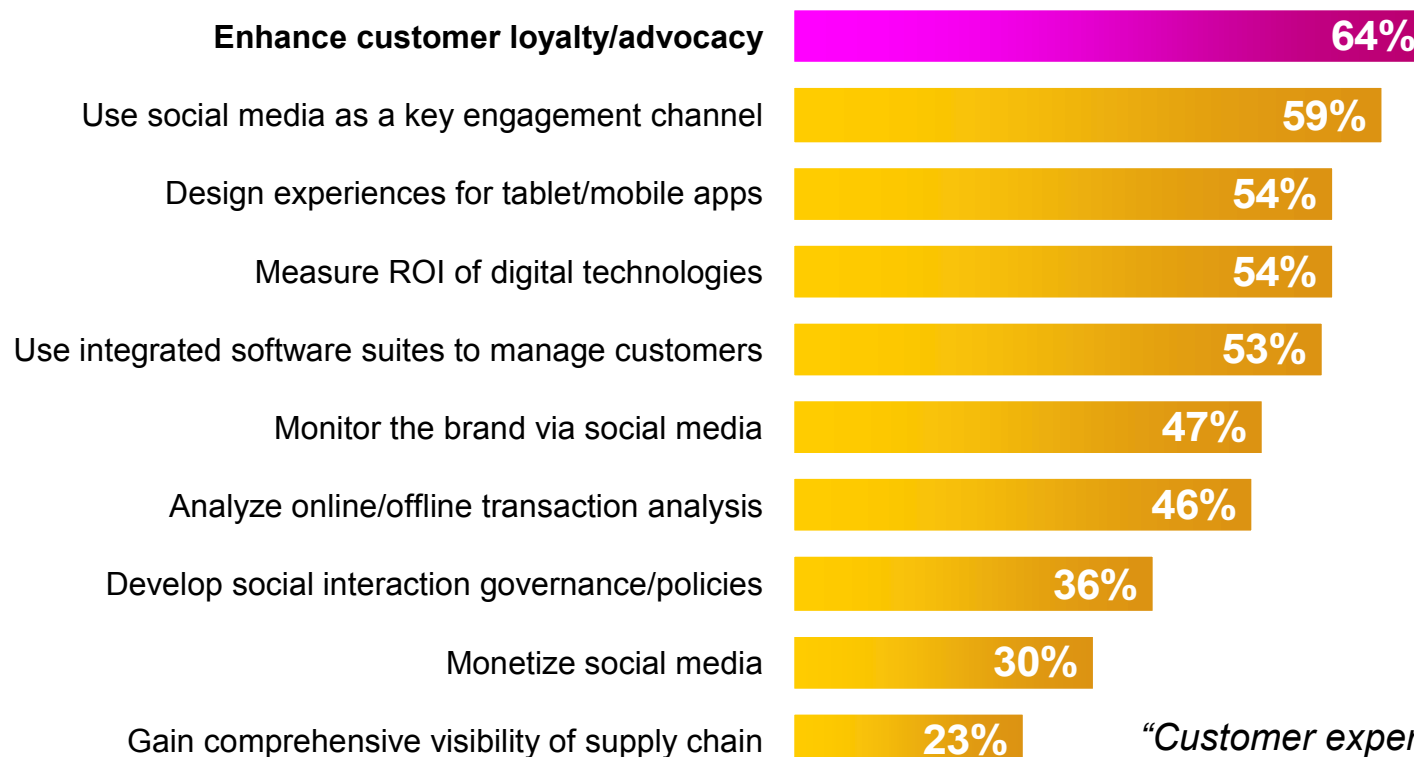
Capture value, measure results

- Demonstrate accountability through ROI
- Recognize shift towards new skills and capabilities

The CMO Agenda – Get fit for the future

Enhancing customer loyalty is the top priority for CMOs as they tackle the shift toward emerging digital technologies

Priorities for managing the shift toward digital technologies



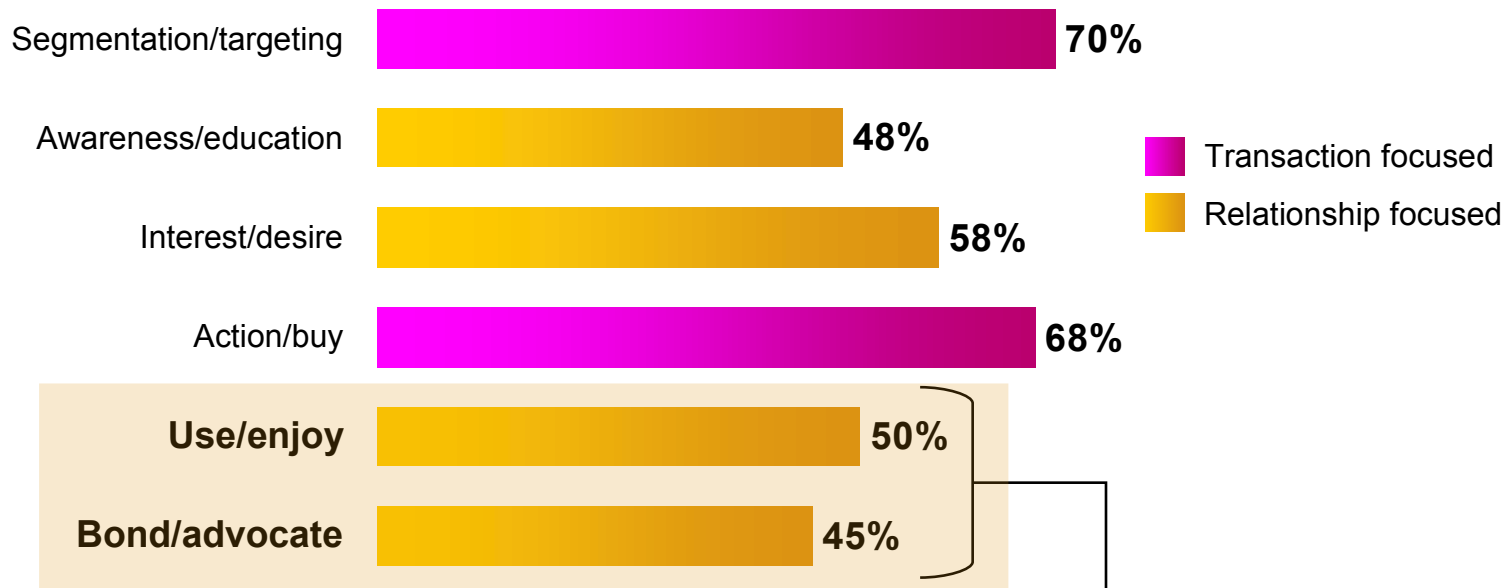
“Customer experience = loyalty”
– VP Marketing, Global Manufacturer

Source: Q12 What are your priorities for managing the shift toward emerging digital technologies? (Select top five.) n=70

Automotive CMOs are emphasizing transaction over relationship focused data

Extensive use of customer data

Percent of CMOs using data captured within customer lifecycle phases



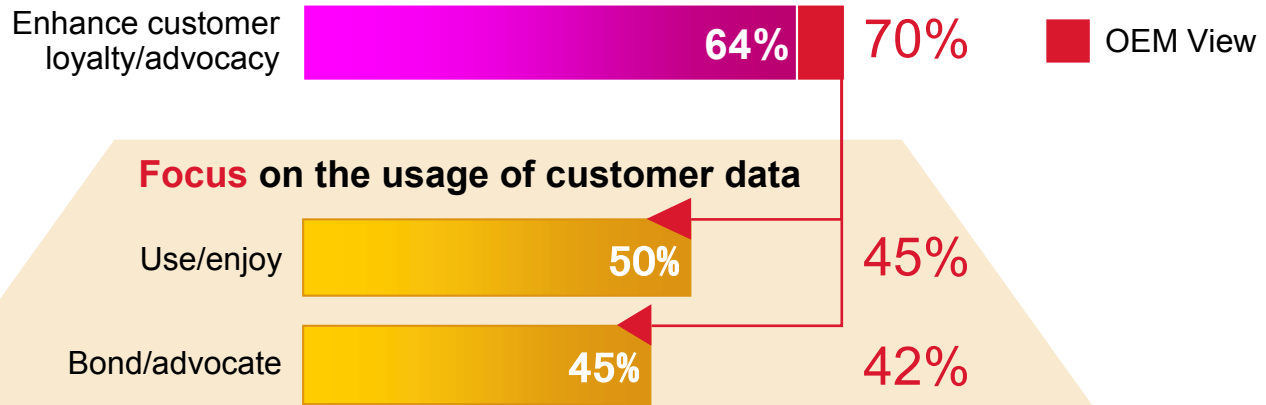
...A post purchase, **ongoing connection** to customers is the greatest area of transformation

Source: Q21 To what extent does your marketing organization capture, analyze and act on customer data generated during the following customer lifecycle phases? n=66

The opportunity to enhance customer loyalty must come from greater emphasis on acquiring and using post sale customer data

Responses for just the OEM's show a paradoxical result...

Priorities for managing the shift toward digital technologies

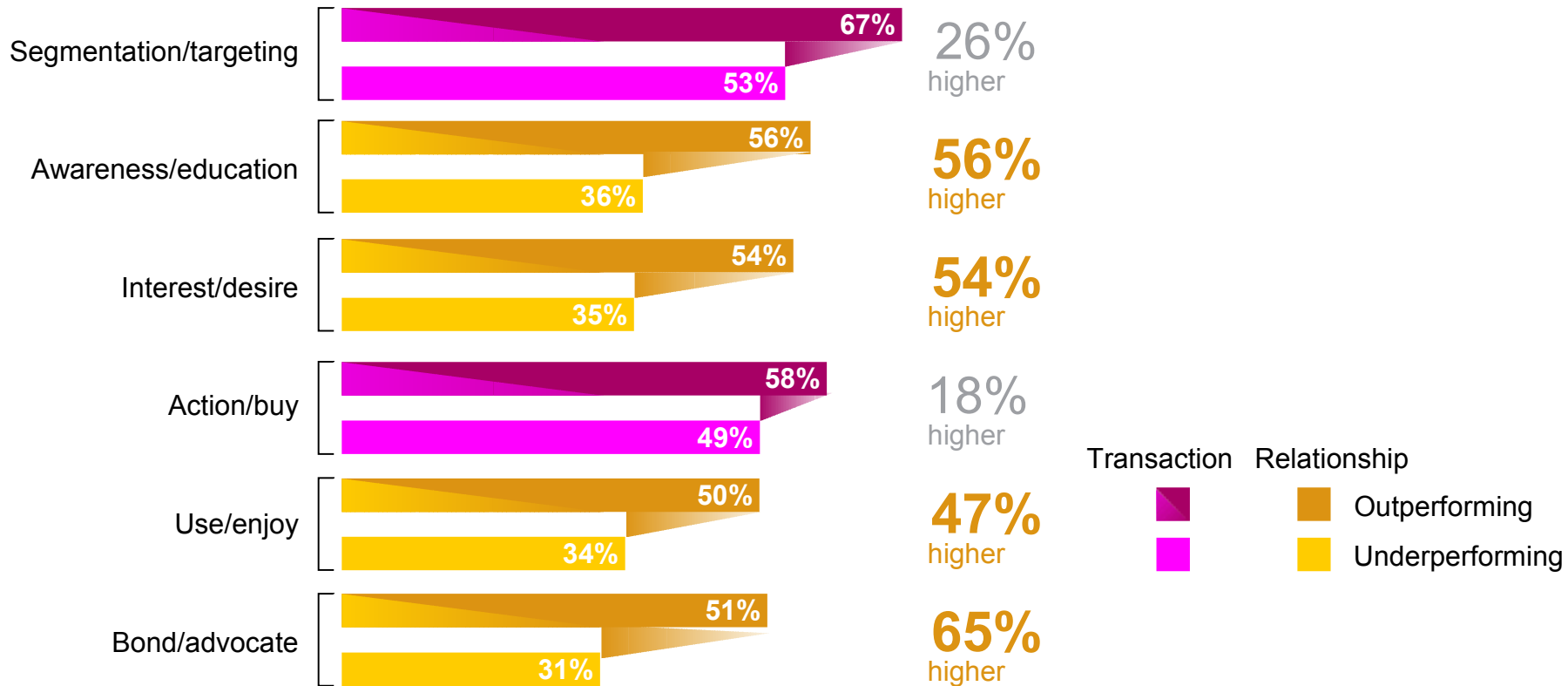


...the path to customer loyalty is through **usage data** from connected vehicles

Further, extensive usage of relationship-based customer data separates the outperforming companies from the underperformers

Extensive use of customer data

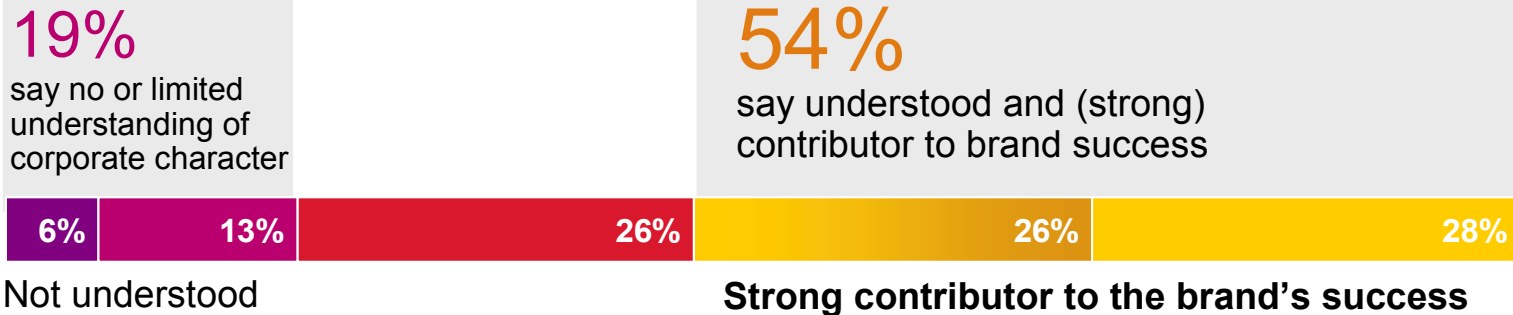
Percent of CMOs using data captured within customer lifecycle phases



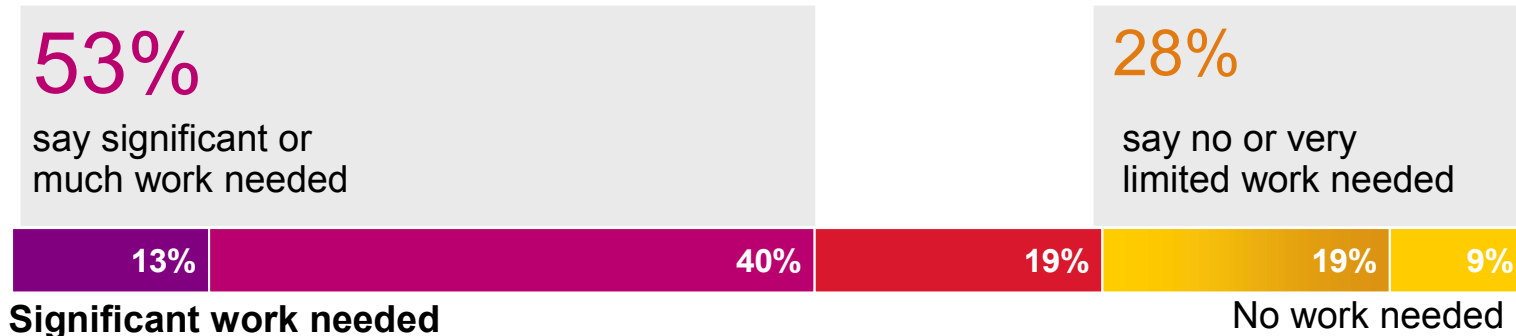
Source: Q21 To what extent does your marketing organization capture, analyze and act on customer data generated during the following customer lifecycle phases?
 n (outperforming) = 478 to 487; n (underperforming) = 366 to 371

While customers have clear expectations based on the corporate character, many employees are not fully on board

Is your corporate character understood in the marketplace?



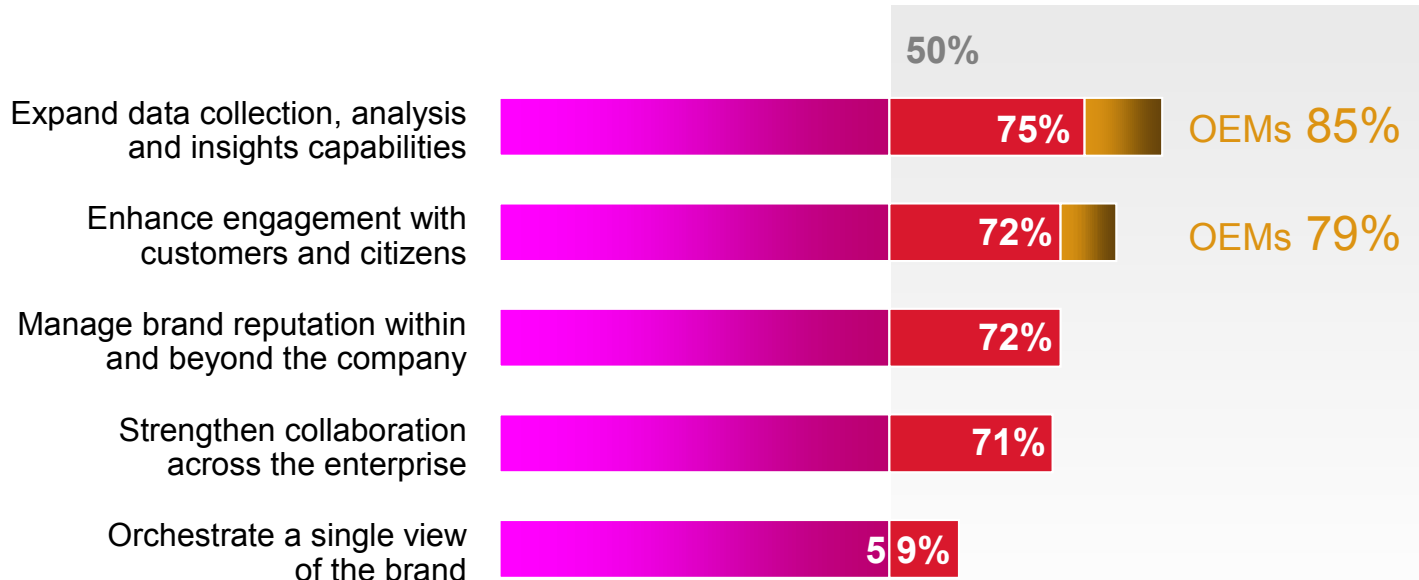
Is much more work needed to get employees on board?



Source: Q10 Is your corporate character understood in the marketplace? n=68; Q11 How much work is needed to have employees embrace and live the corporate character? n=68

Marketing needs to drive broad changes in the organization to engage and synthesize the connection to customers and citizens

Top 5 initiatives driven by transparency Percent of CMOs selecting initiatives



“One of our biggest challenges is in data analysis; I feel we are laggards in advanced analytics capabilities”
– CMO, US Supplier

“Product recall is a good example of how we manage transparency well”
– CMO, Emerging Market OEM

Source: Q9 To what extent does transparency create a need for you to: n=67 to 69

Recommendations and tough questions – Foster lasting connections

Jumpstart relationships.

- Capitalize on new digital channels to stimulate conversations with existing and potential customers, and create new types of relationships to reveal untapped opportunities. Use tangible incentives to attract followers.



How do your marketing tactics and investments work in sync to create and grow a pervasive and innovative total customer relationship?

Connect continuously.

- Engage with your customers and citizens at every stage in the customer lifecycle, and build online and offline communities to strengthen your brand.



What steps are you taking to connect customer insights with product and service development, and stimulate your customers to become brand or company advocates?

Champion your organization's corporate character.

- Help the enterprise define and activate the traits that make it unique. Work with the entire C-suite to meld the internal and external faces of the enterprise.



How are you collaborating with your C-level peers to activate your “corporate character” across all touch points and experiences?

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Capture value, measure results

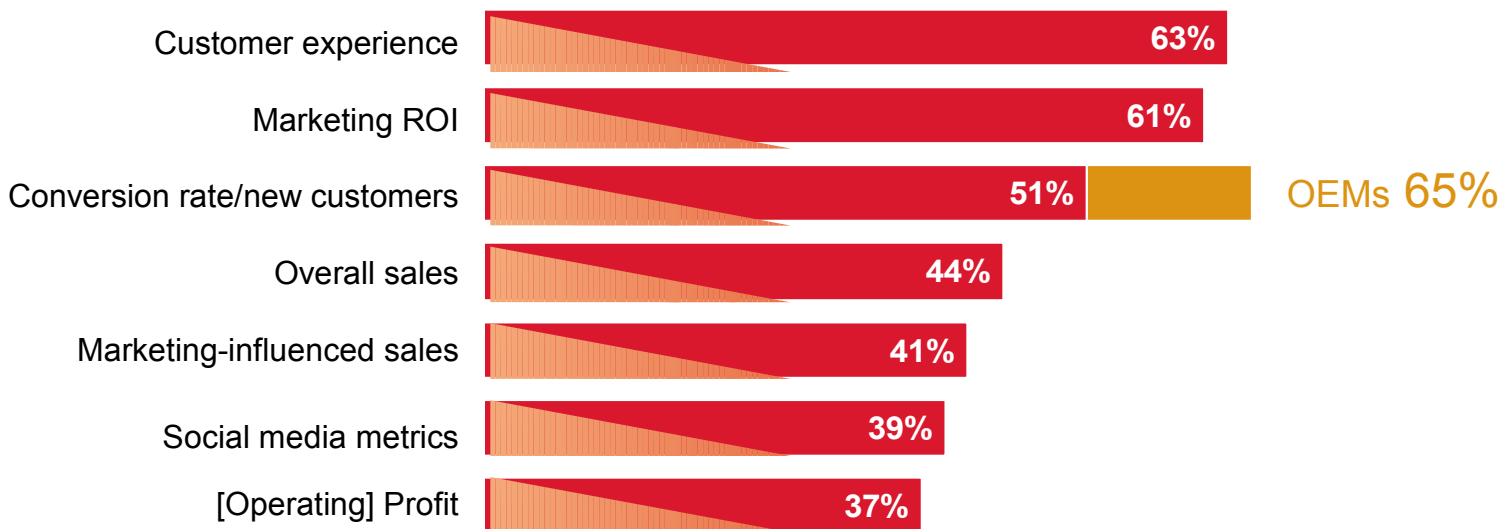
- Demonstrate accountability through ROI
- Recognize shift towards new skills and capabilities

The CMO Agenda – Get fit for the future

Success will be measured through the reaching and converting new customers through a new experience with automakers

Most important measures to gauge marketing success

Percent of CMOs selecting success measurements

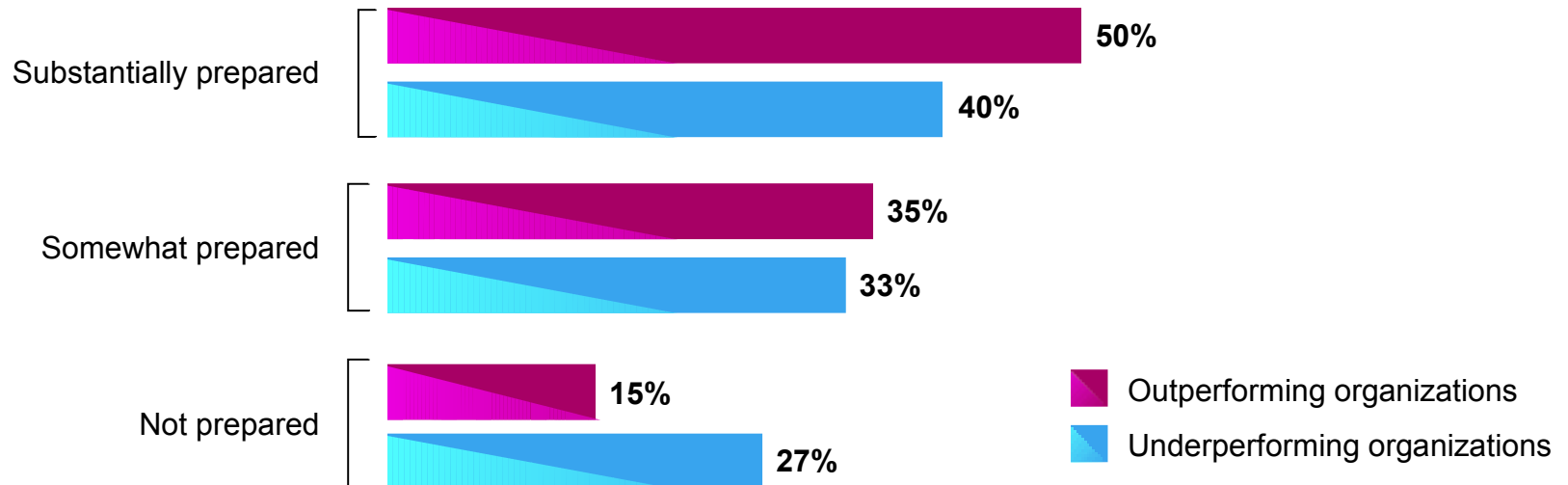


Source: Q19 What are the 5 most important measurements you (will) use to gauge marketing success by 2015? n=70

Readiness to manage ROI separates outperforming marketing organizations from underperforming ones

Level of preparedness for managing ROI

Percent of CMOs reporting preparedness

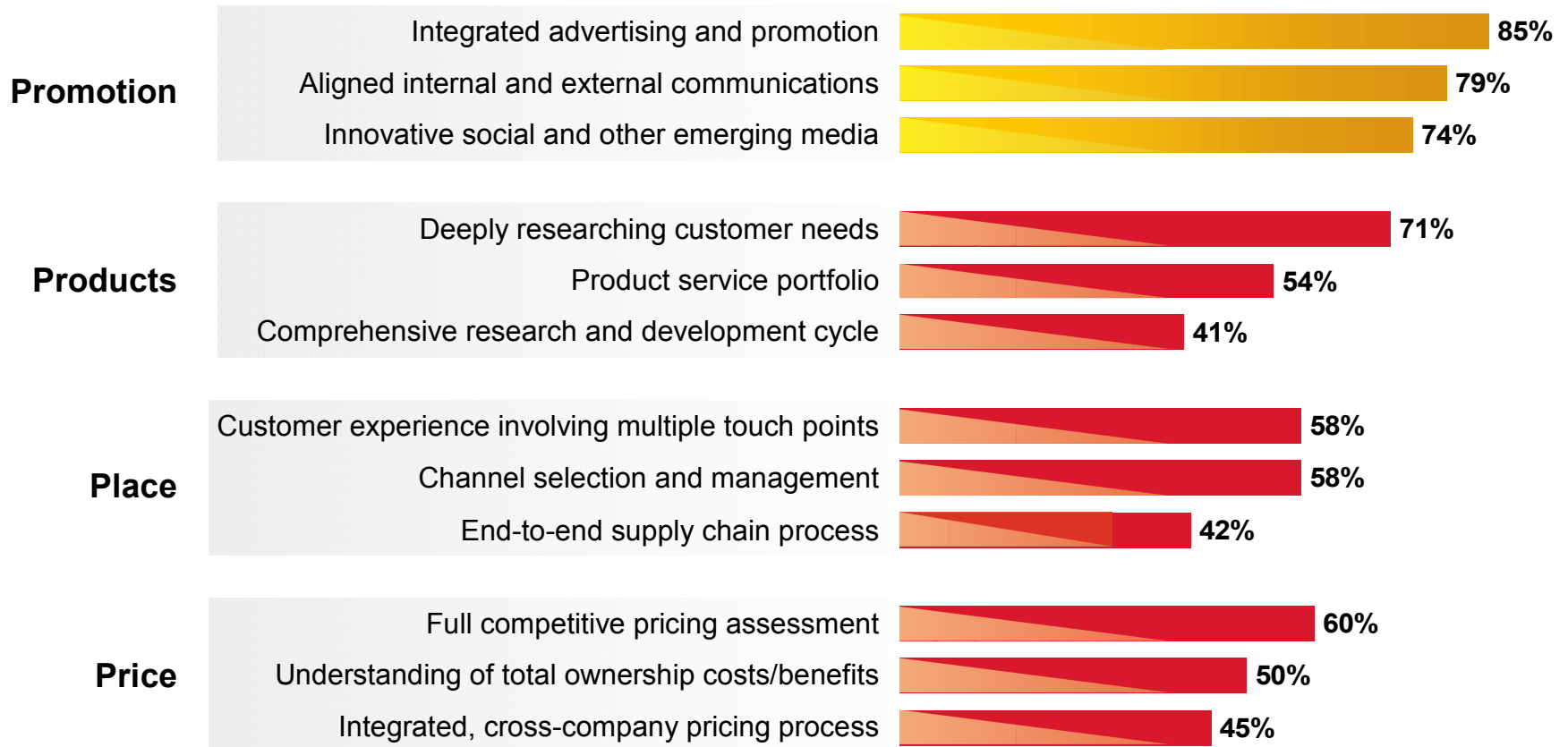


“There is no way to measure marketing ROI; the challenge is to get the data and develop the metrics”
 – CMO, US Supplier

“We must ensure that we understand and are ready to accept ROI as a critical measurement”
 – CMO, European Supplier

To truly deliver marketing ROI, CMOs need to have influence across all four Ps, not just promotion

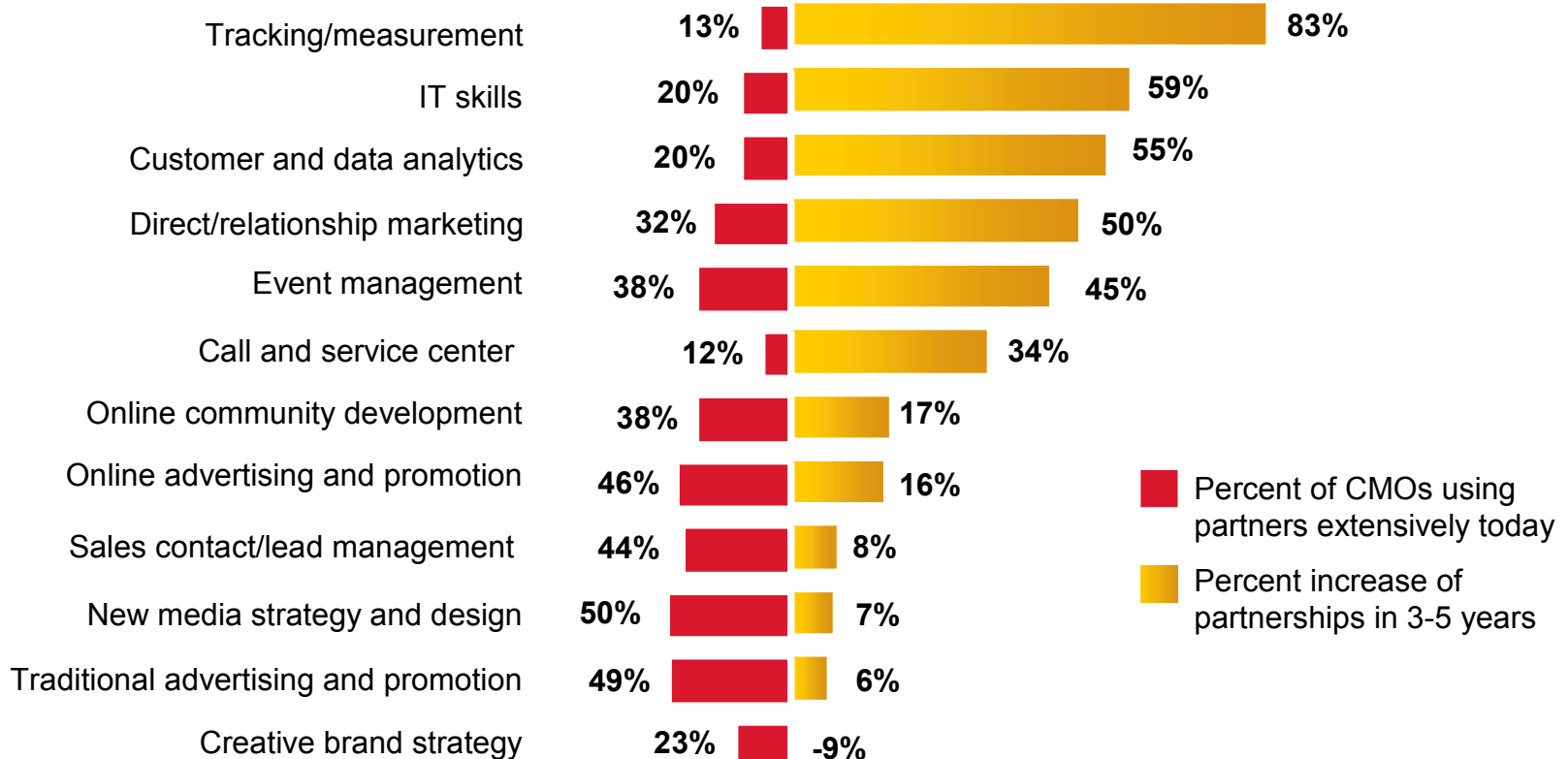
Percent of CMOs citing significant influence



Source: Q14 How much influence do you and your organization have over the “Four Ps” and their related sub-factors? n=64 to 68

To gain influence, CMOs need to introduce new skills into the marketing's mix; many plan to tap external expertise

CMOs' use of external partnerships



“It is important that we make marketing a priority and acquire the right skills; we need to make marketing interwoven with our business processes”

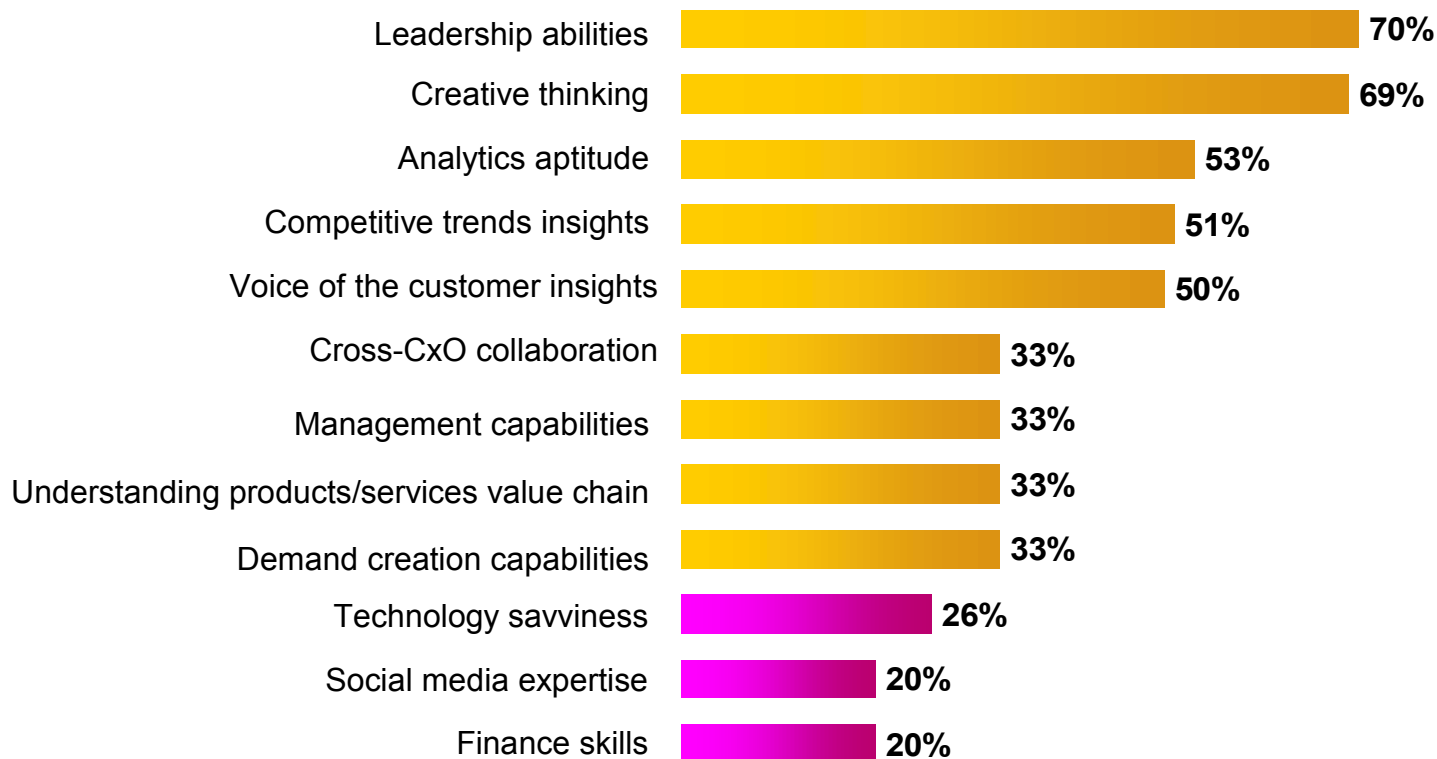
– CMO, US Truck Manufacturer

Source: Q16 What do you do within marketing and what resources will you tap into, to manage marketing today and going forward? (in 3 to 5 years) n (Today) = 59 to 66 n (in 3-5 years) = 59 to 65

CMOs also can expand their personal influence by shifting to new capabilities that focus on technology, social media and ROI

Capabilities for personal success over next 3-5 years

Percent of CMOs selecting capabilities



Source: Q17 What capabilities do you need to be personally successful over the next 3 to 5 years? n=70

Recommendations and tough questions – Capture value, measure results

Capitalize on new tools to measure what matters.

- Use advanced analytics and compelling metrics to improve decision making and to demonstrate your accountability.



How are you measuring and analyzing the results of your initiatives and communicating them to advance your marketing function's credibility and accountability?

Enhance business acumen.

- Adjust your talent mix to increase technical and financial skills, and grow your digital expertise by finding new partners to supplement your in-house resources.



What are you doing to enrich the skills mix in the marketing function and build technical, financial and digital acumen?

Lead by example.

- Expand your horizons by enhancing your personal financial, technical and digital savviness.



In what ways are you personally investing to broaden your capabilities?

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The CMO Agenda – Get fit for the future



Moving from Stretched to Strengthened

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- Focus on creating value for customers as individuals
- Reprioritize investments to mine digital channels to access customers' views and use advanced analytics to recognize preferences and trends across every touch point
- Work with IT to assess potential data and infrastructure exposures, employ tools to secure customer data and update privacy policies to address customers' concerns

Foster lasting connections

- Capitalize on new digital channels to stimulate customer conversations and new relationships; use tangible incentives to attract followers
- Engage with customers throughout the customer lifecycle; build online/offline communities to strengthen your brand
- Help the enterprise define and activate traits that make it unique and engage the C-suite to meld the internal and external faces of the enterprise

Capture value, measure results

- Use advanced analytics and compelling metrics to improve decision making and to demonstrate accountability
- Adjust your talent mix to increase technical and financial skills, and grow digital expertise by finding new partners to supplement in-house resources
- Expand your horizons by enhancing your personal financial, technical and digital savviness

In addition to strategic actions, there are three initiatives CMOs can start today to become better prepared for the digital era

1

Create small action teams

- Establish a short-term task force for each imperative to develop recommendations for improvements
 - Invite eager marketing futurists from your organization to participate
 - Break challenges in chunks to address the big picture, details and dependencies
 - Identify opportunities for small wins and boost support for more radical initiatives

2

Schedule time with your C-suite peers

- Be proactive with collaboration
 - CIO: Discuss improvements for marketing technologies and tools
 - CFO: Explore financial implications and accountability
 - CHRO: Consider how to empower employees to better represent your corporate character

3

Engage like a customer

- Live your customers' experience with your brand. What does it feel like to be a segment of "one"?
 - Drop in on stores and sites
 - Visit your call center, sit in with representatives, or remotely access randomly recorded calls
 - Join the customer conversation via social media

From Stretched to Strengthened

APPENDIX
Global Slides

CMO
C-suite
Studies

CMOs feel unprepared for the amount of complexity they face

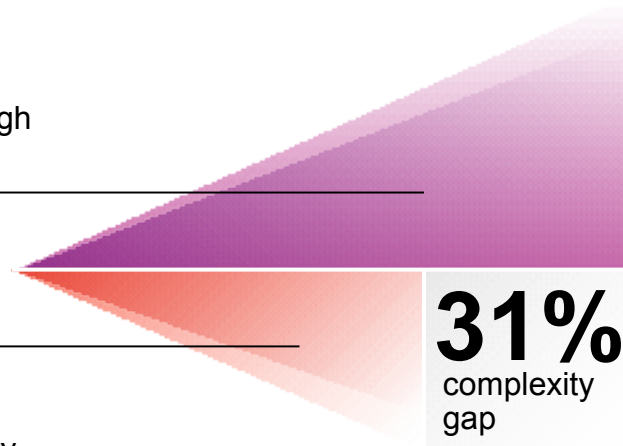
Expected level of complexity and preparedness to handle *Percent of CMOs responding*

79%

Expect high/very high level of complexity over 5 years

48%

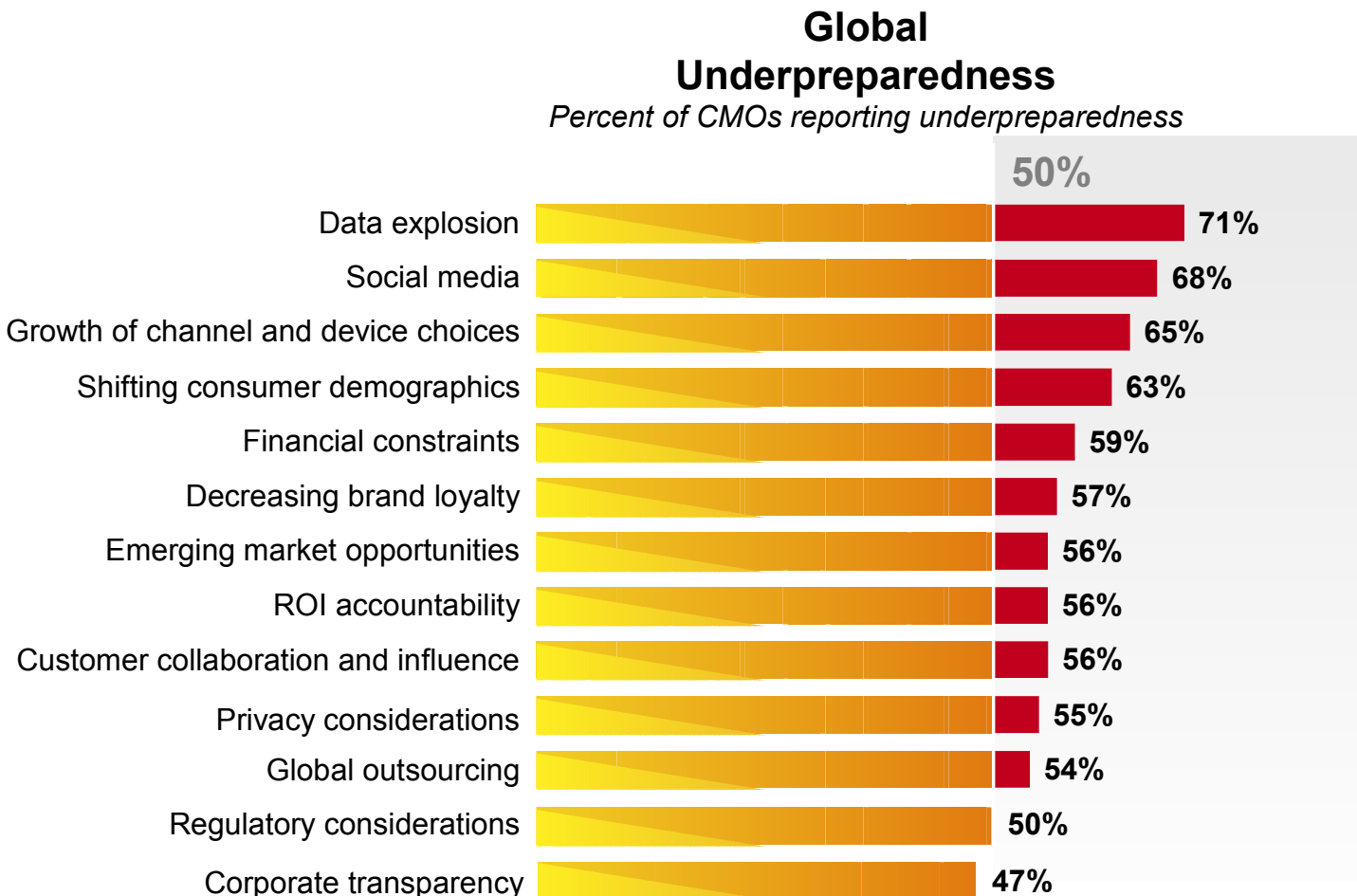
Feel prepared for expected complexity



“In this coming age of complexity and uncertainty, there is a serious risk of ‘losing our north,’ of being intoxicated by data overload and suffering from corporate indigestion.”

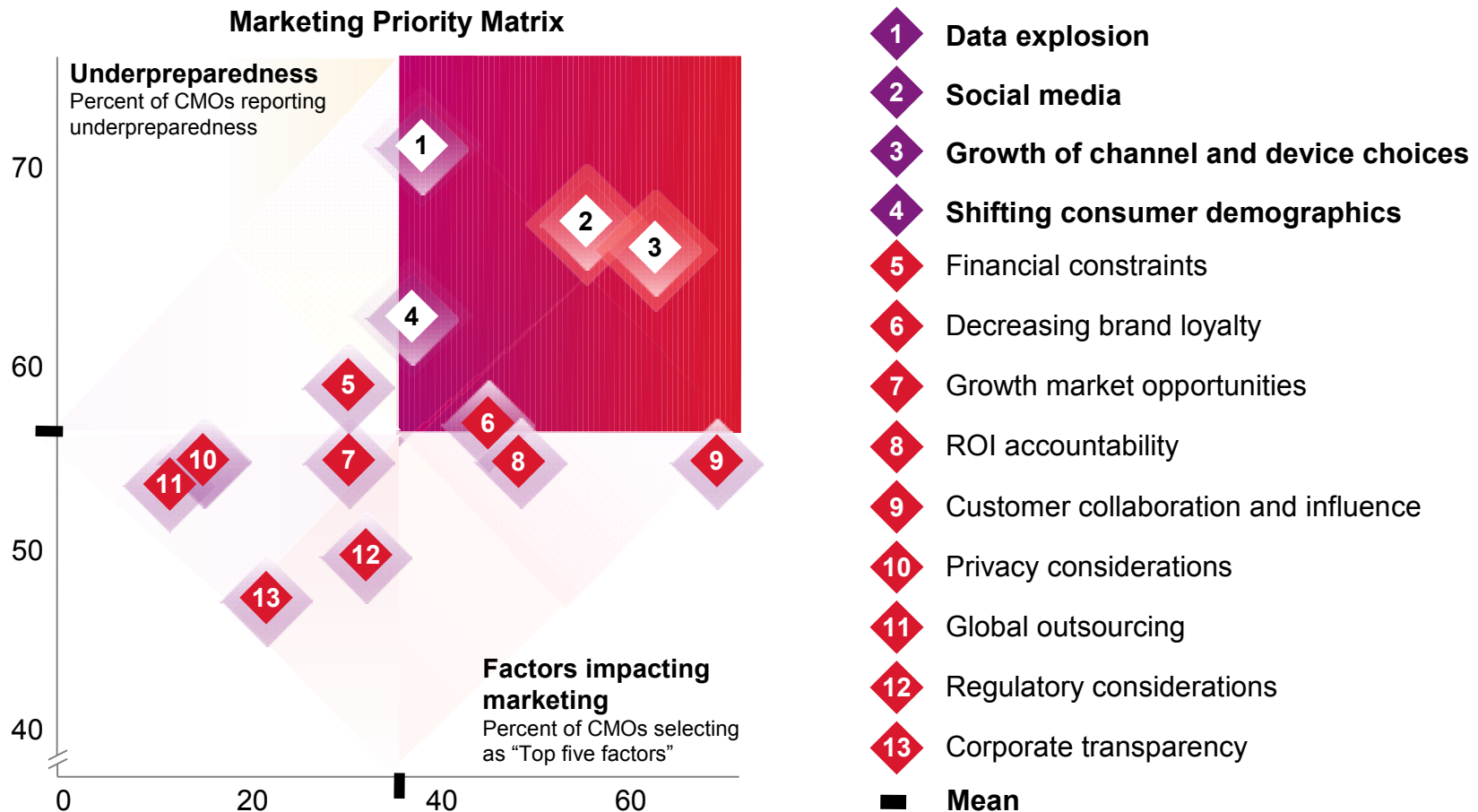
Industrial products
senior managing director/marketing, Spain

The vast majority of CMOs are underprepared to manage the impact of key changes in the marketing arena



Source: Q8 How prepared are you to manage the impact of the top 5 market factors that will have the most impact on your marketing organization over the next 3 to 5 years?
 n=149 to 1141 (n = number of respondents who selected the factor as important)

We wanted to understand which underprepared areas are the most critical for CMOs

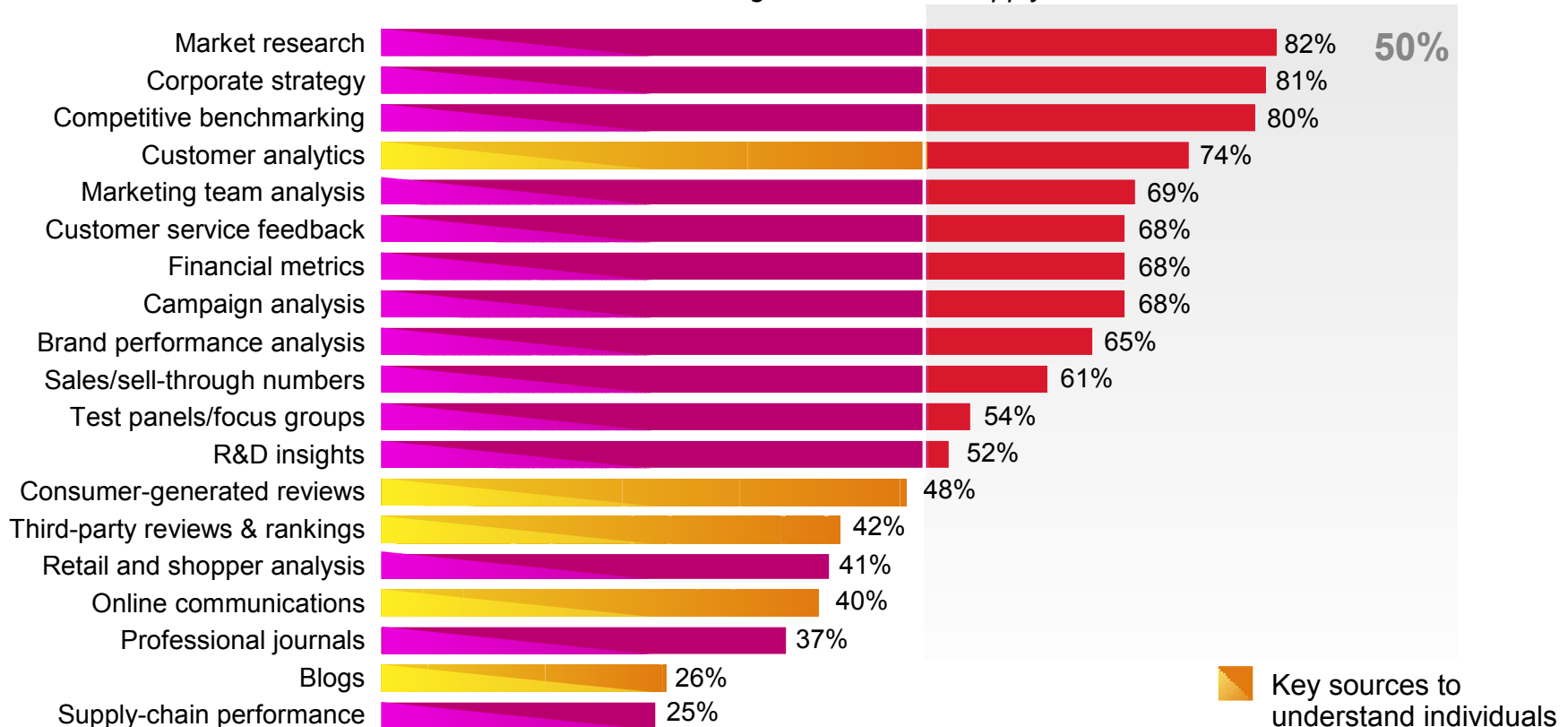


Source: Q7 Which of the following market factors will have the most impact on your marketing organization over the next 3 to 5 years? n1=1733; Q8 How prepared are you to manage the impact of the top 5 market factors that will have the most impact on your marketing organization over the next 3 to 5 years? n2=149 to 1141 (n2 = number of respondents who selected the factor as important in Q7)

Most CMOs are still focusing on understanding *markets* versus understanding *individuals* to shape their strategy

Global Sources used to influence strategy decisions

Percent of CMOs selecting all sources that apply



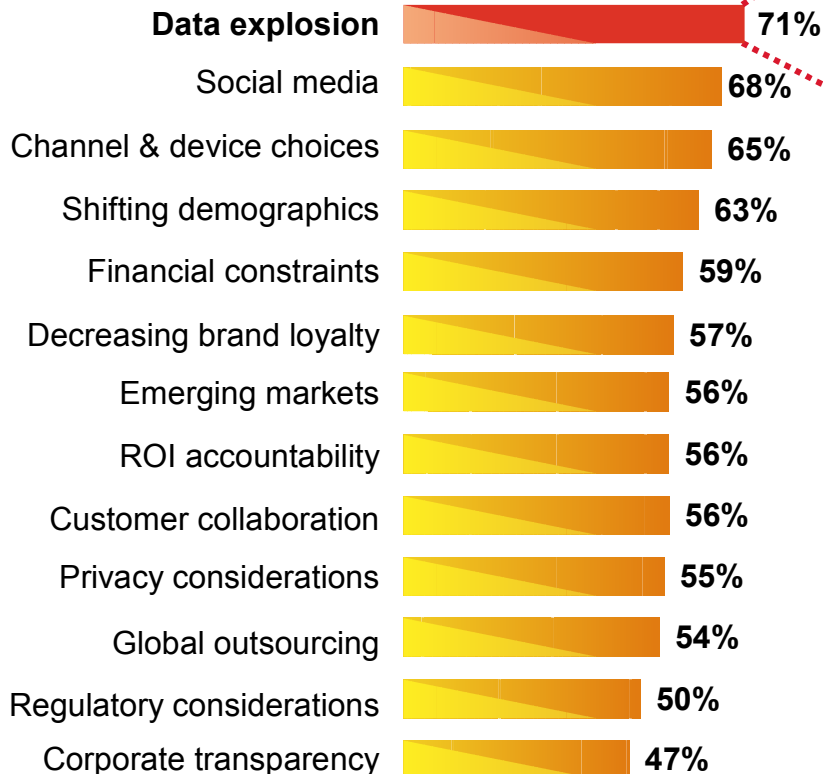
Source: Q15 What sources of information influence your marketing strategy decisions? n=1733

CMOs are overwhelmingly underprepared for the data explosion and recognize need to invest in and integrate technology and analytics

Global

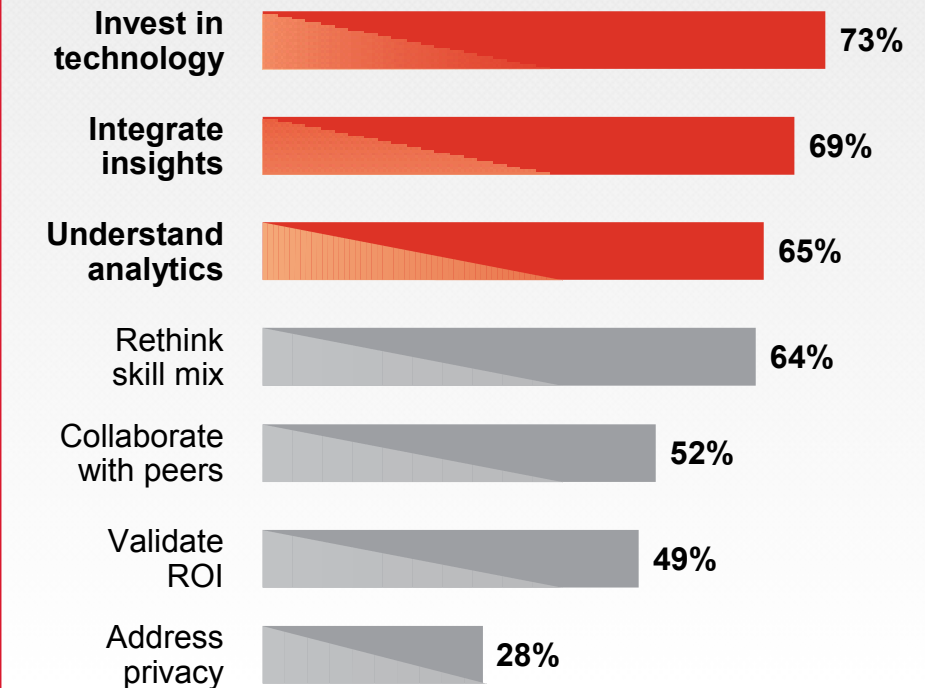
Underpreparedness

Percent of CMOs selecting as "Top 5 Factors"



Need for change to deal with data explosion

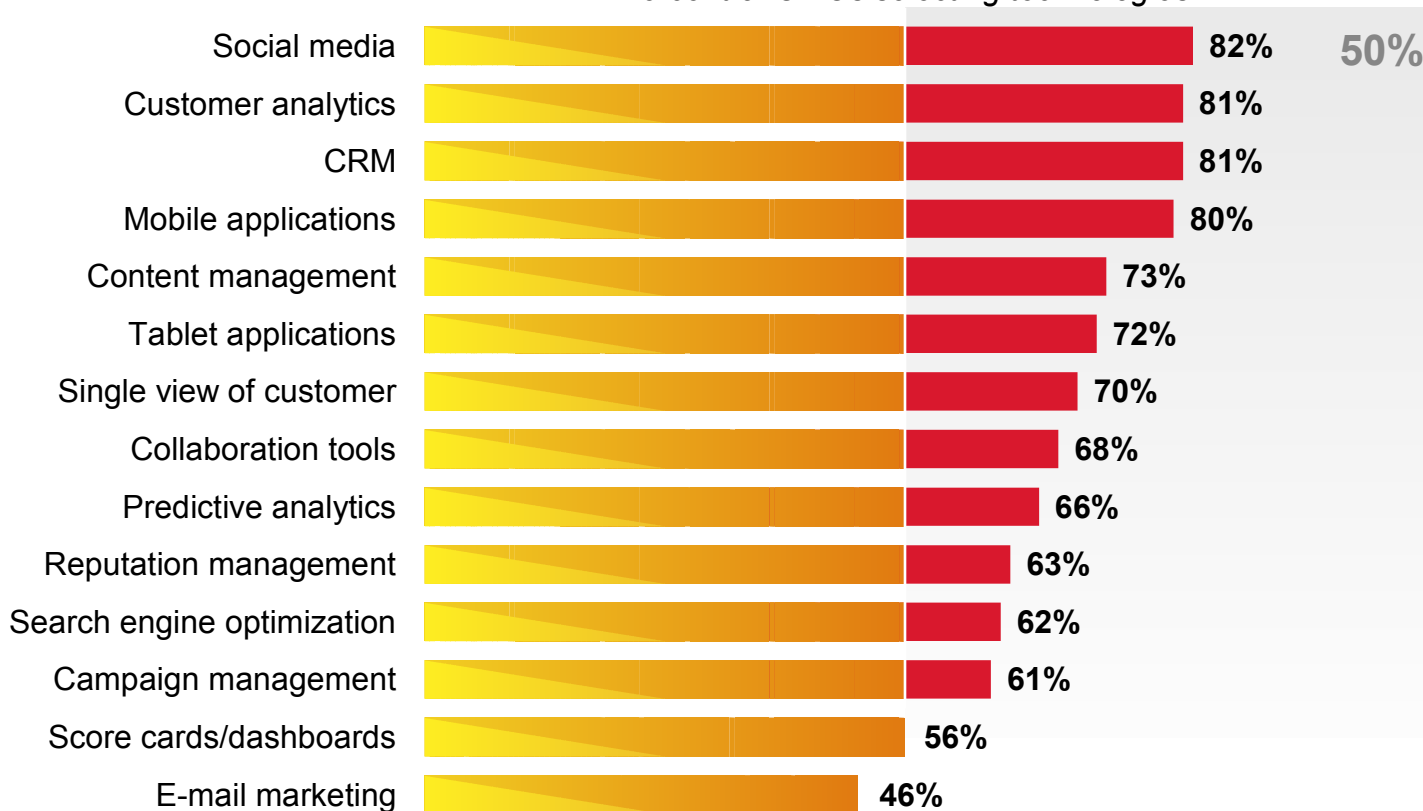
Percent of CMOs indicating high/significant need



Source: Q8 How prepared are you to manage the impact of the top 5 market factors that will have the most impact on your marketing organization over the next 3 to 5 years? n=149 to 1141; Q20 To what extent will the opportunity to collect unprecedented amounts of data require you to change? n=1629 to 1673

Majority of CMOs are eager to deploy tools and technologies to grapple with growing volume, velocity and variety of data

Global Plans to increase the use of technology *Percent of CMOs selecting technologies*

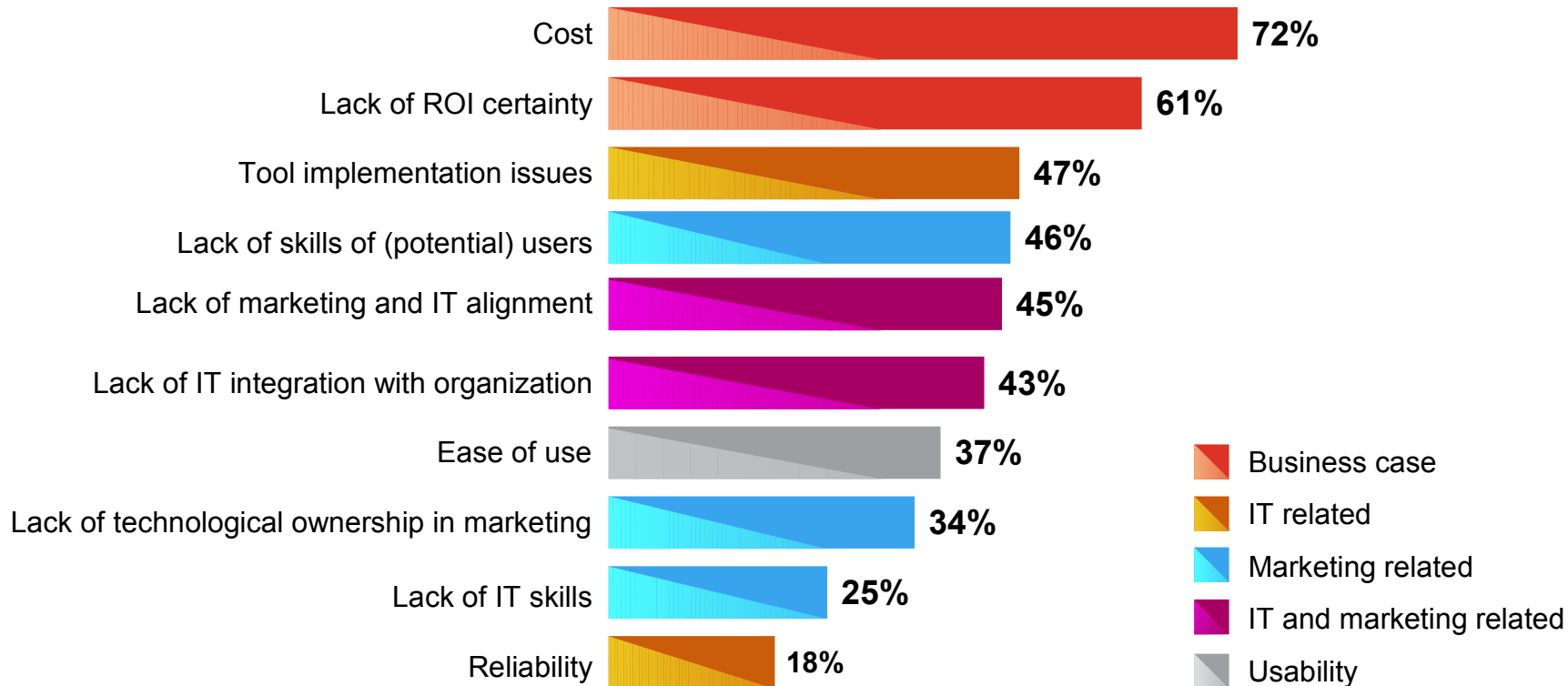


Source: Q22 Do you plan to decrease or increase the use of the following technologies over the next 3 to 5 years? n=1616 to 1671

What's inhibiting them? Building the business case, IT-marketing alignment/integration issues and marketing technology skills

Global Barriers to using technology in marketing

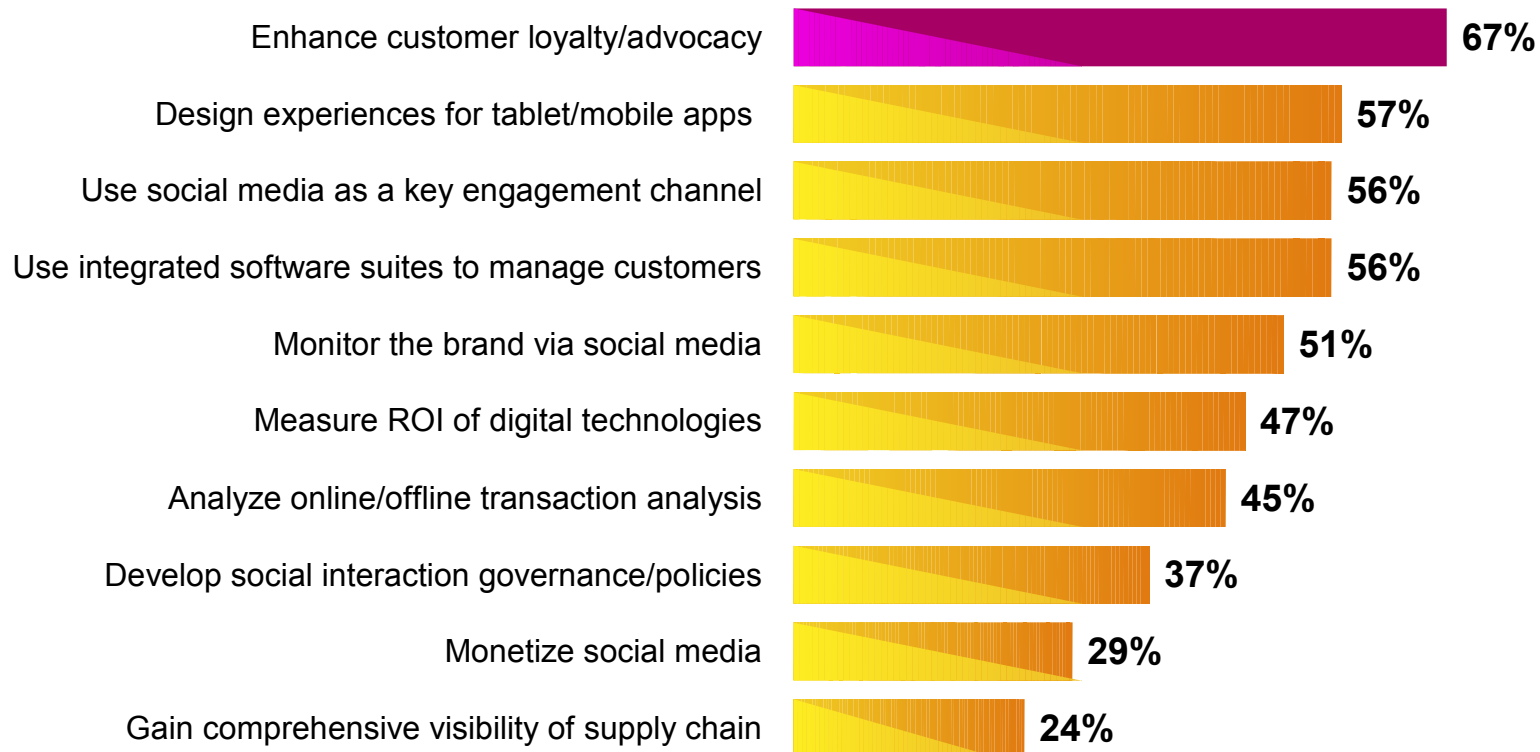
Top 5 selected by CMOs



Source: Q23 What are the top 5 barriers to using technology? n=1733

Confronted with the shift toward emerging digital technologies, CMOs see enhancing customer loyalty as the top priority

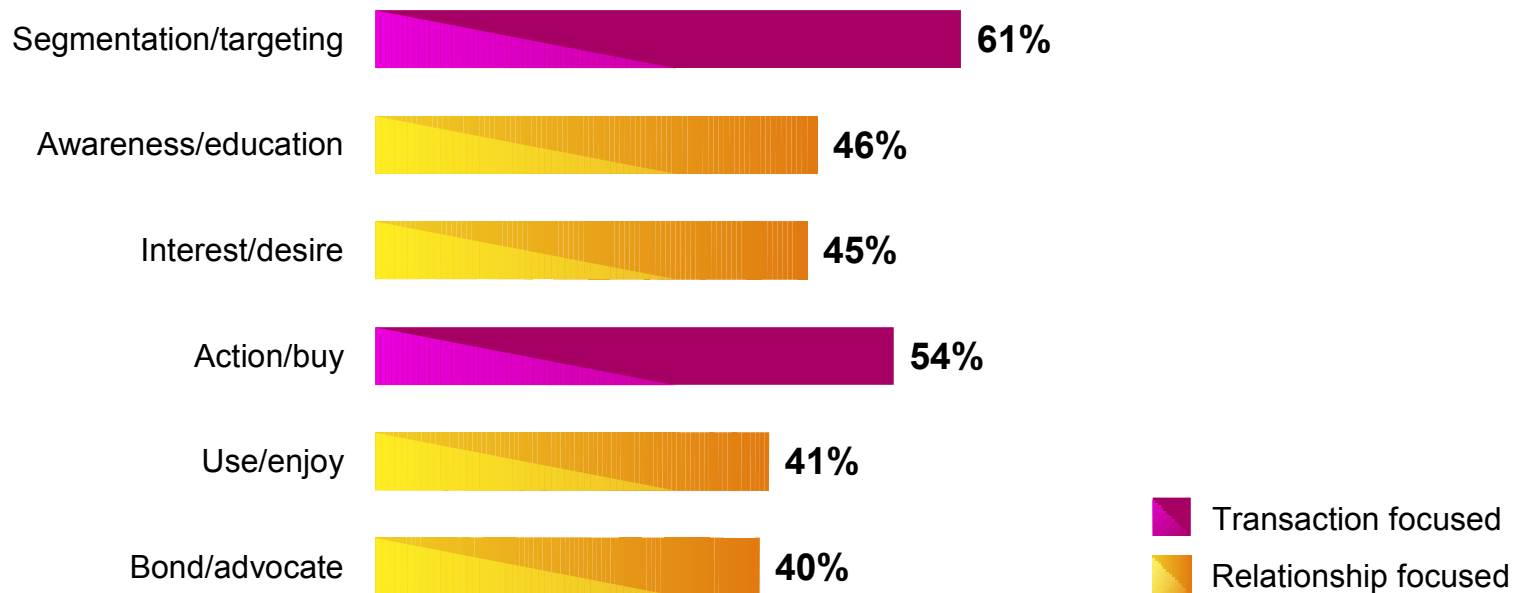
Global Priorities for managing the shift toward digital technologies



Source: Q12 What are your priorities for managing the shift toward emerging digital technologies? (Select top five.) n=1733

However, most CMOs are using data to manage transactions, not relationships

Global
Extensive use of customer data
Percent of CMOs using data captured within customer lifecycle phases

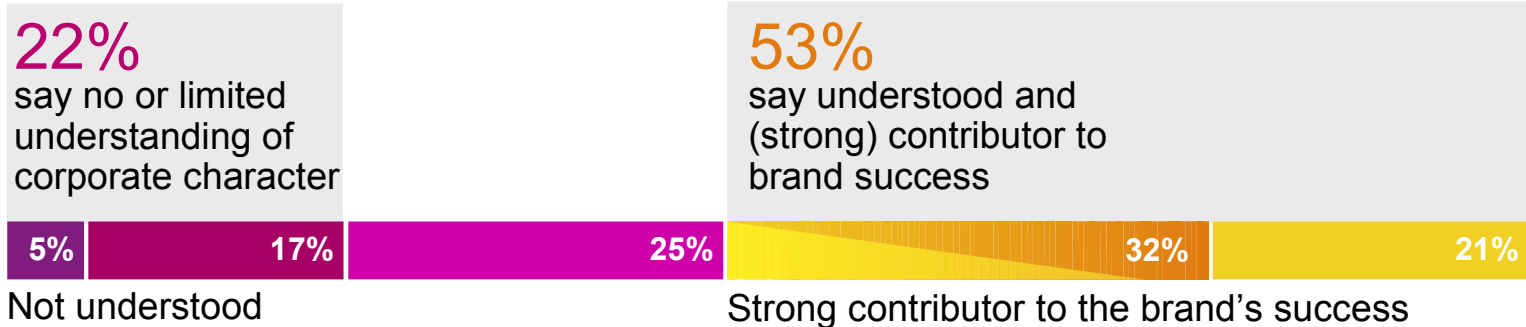


Source: Q21 To what extent does your marketing organization capture, analyze and act on customer data generated during the following customer lifecycle phases?
 n=1626 to 1653

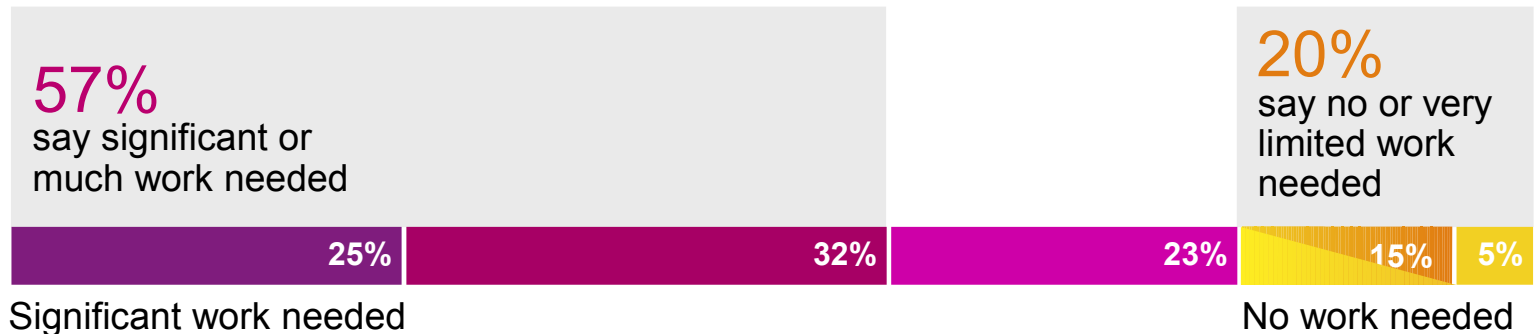
Customers have clear expectations based on the corporate character, yet employees are not fully on board

GLOBAL

Is your corporate character understood in the marketplace?



Is much more work needed to get employees on board?

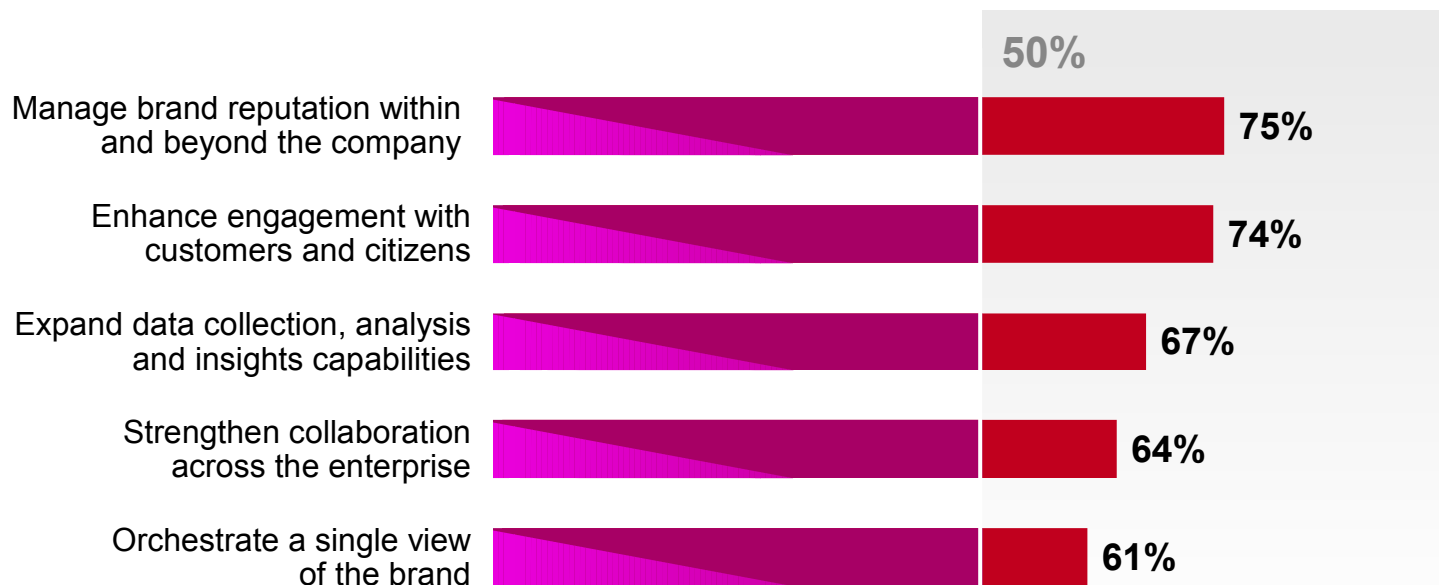


Source: Q10 Is your corporate character understood in the marketplace? n=1702; Q11 How much work is needed to have employees embrace and live the corporate character? n=1703

To activate the corporate character in a transparent world, marketing needs to drive broad changes in the organization

Global Top 5 initiatives driven by transparency

Percent of CMOs selecting initiatives



“Traditionally, corporate culture and character have been managed by HR, but it can't remain there in a digital environment. The world of separate internal and external messages is gone, and internal actions, memos and decisions can impact your brand just as much as an advertising campaign.”

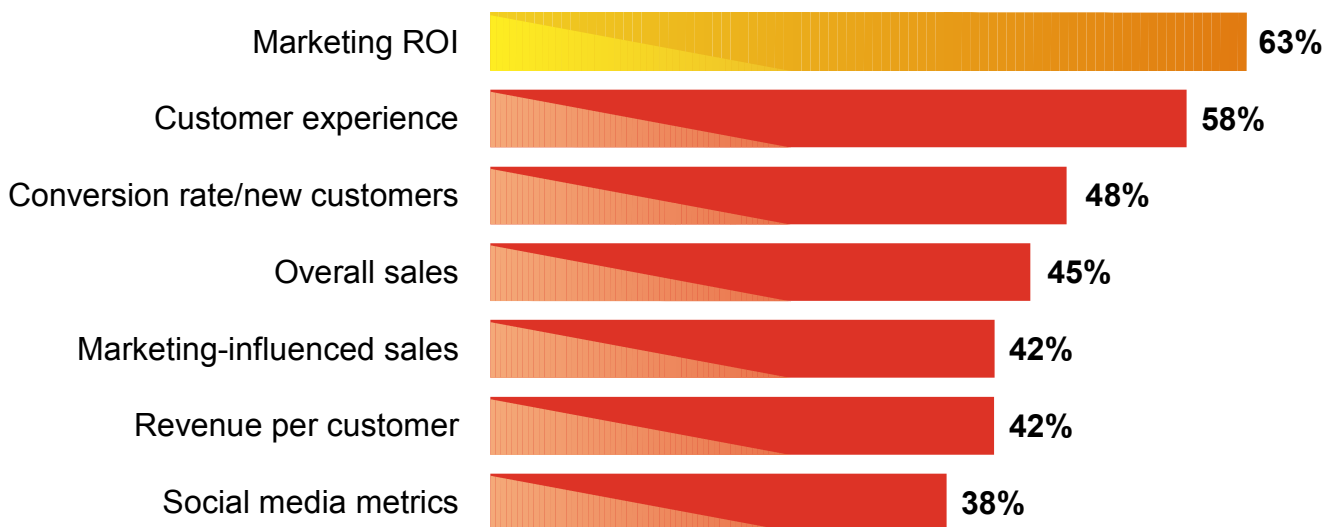
Financial markets EVP, head of global marketing, US

Source: Q9 To what extent does transparency create a need for you to: n=1645 to 1675

CMOs believe ROI on marketing spend will be the number one method for determining success by 2015

Global Seven most important measures to gauge marketing success

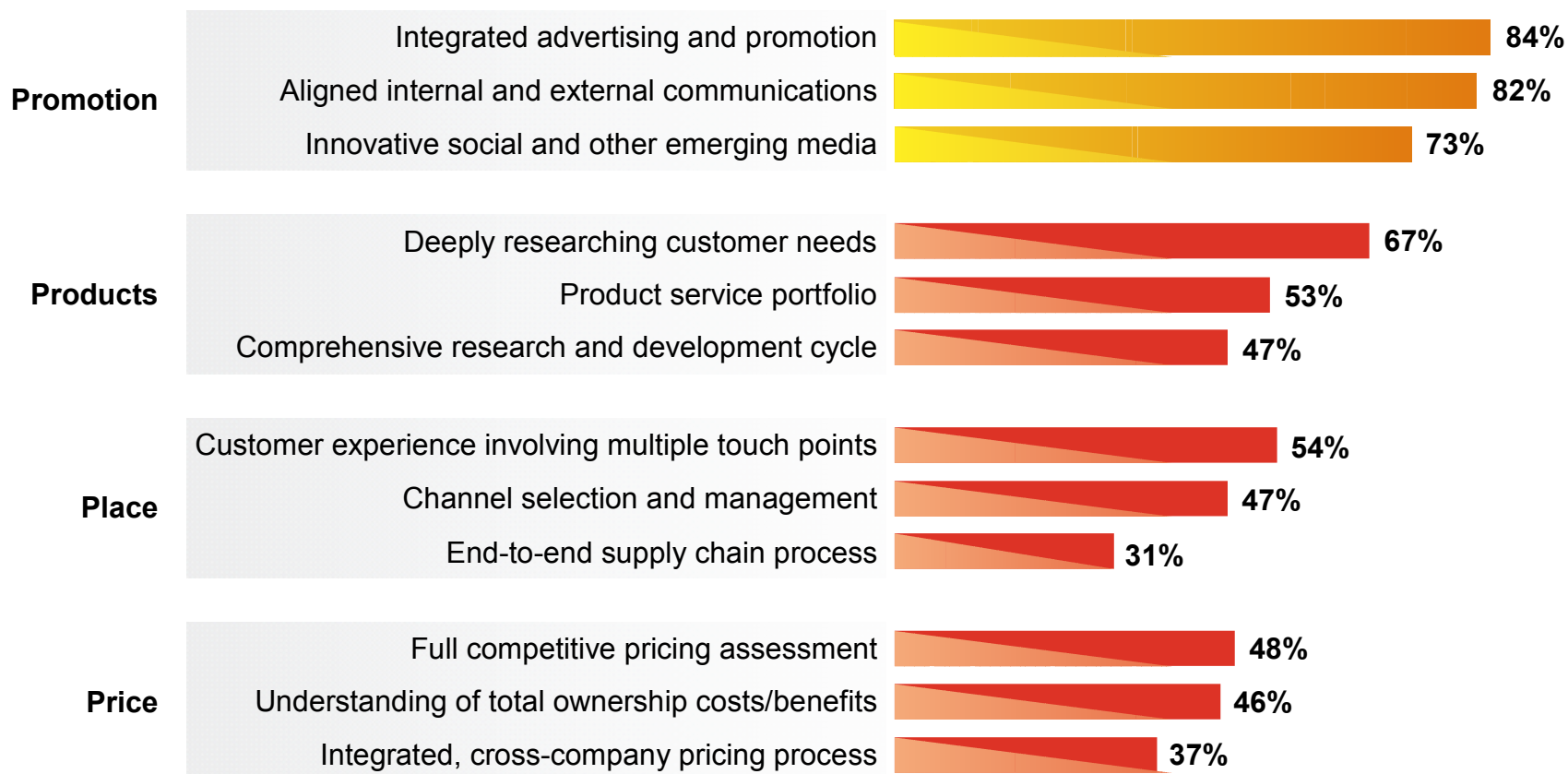
Percent of CMOs selecting success measurements



Source: Q19 What are the 5 most important measurements you (will) use to gauge marketing success by 2015? n=1733

To truly deliver marketing ROI, CMOs need to have significant influence across all four Ps, not just promotion

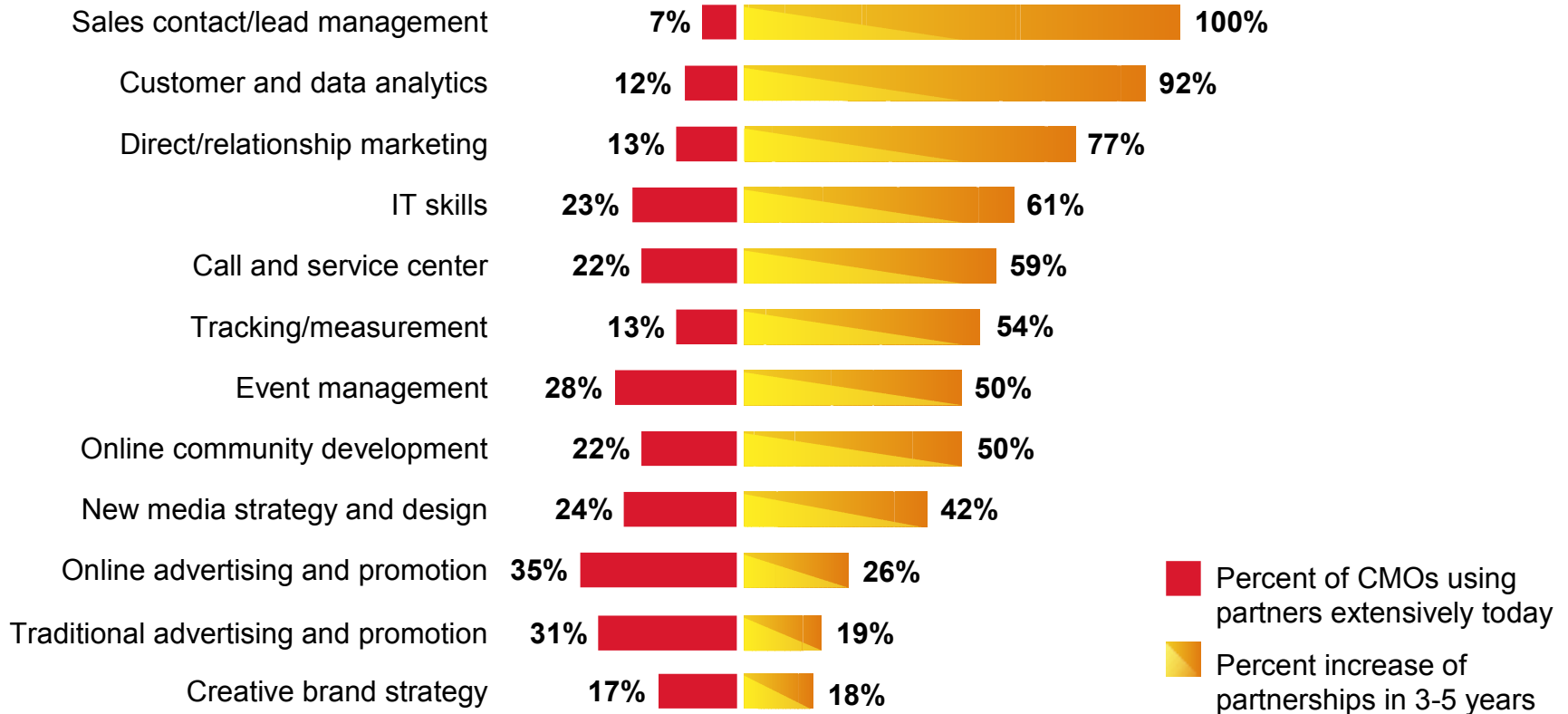
Global Percent of CMOs citing significant influence



Source: Q14 How much influence do you and your organization have over the "Four Ps" and their related sub-factors? n=1580 to 1703

To gain influence, CMOs need to introduce new skills into marketing's mix; many plan to tap external expertise

Global CMOs' use of external partnerships

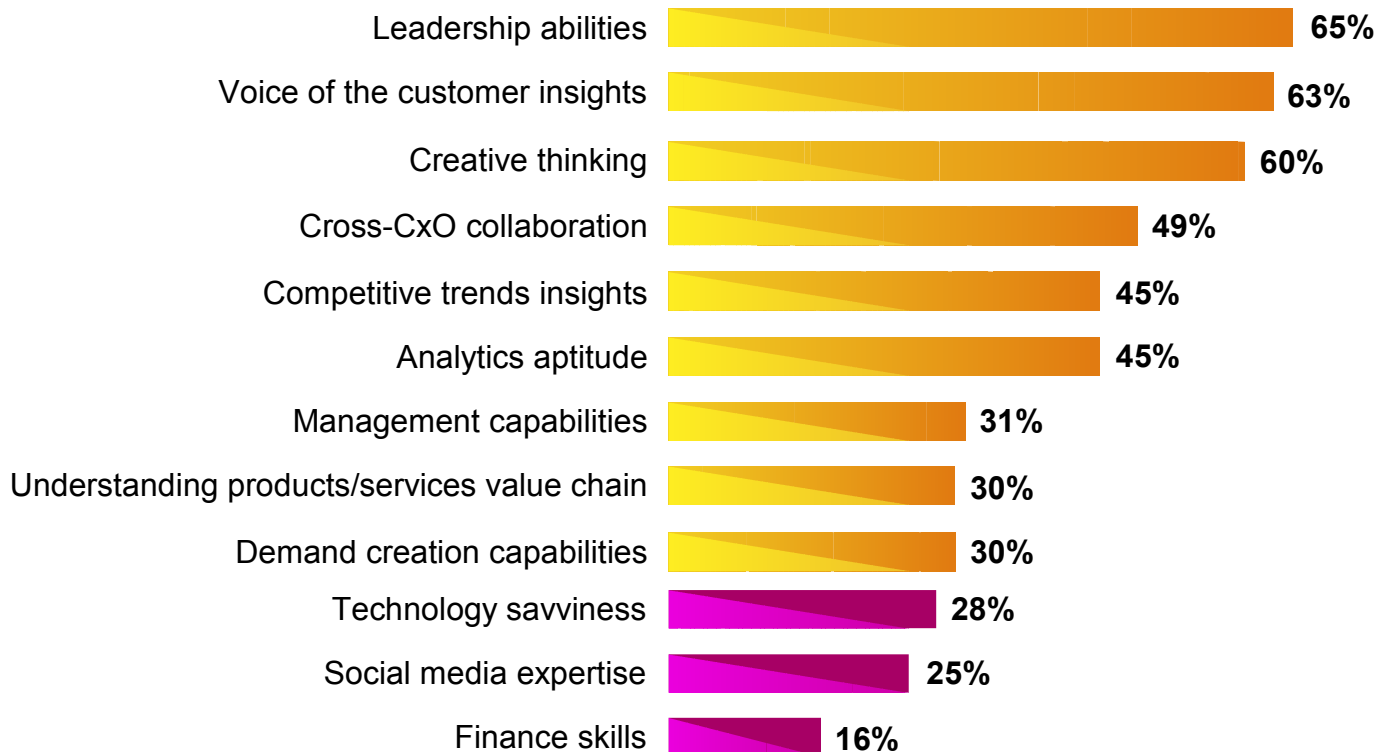


Source: Q16 What do you do within marketing and what resources will you tap into, to manage marketing today and going forward? (in 3 to 5 years)
n (Today) = 1440 to 1668 n (in 3-5 years) = 1481 to 1636

CMOs also can expand their personal influence by shifting to new capabilities that focus on technology, social media and ROI

Global Capabilities for personal success over next 3-5 years

Percent of CMOs selecting capabilities



Source: Q17 What capabilities do you need to be personally successful over the next 3 to 5 years? n=1733