

A NEW PLAYBOOK FOR CHIEF MARKETING OFFICERS

Why CMOs should enable real-time
marketing to drive sustainable growth



INTRODUCTION

Data has never been more important to marketing than it is today. Customer-data volumes are growing as digitization and online sales accelerate. With a surge in ecommerce growth in the past decade, ensuring a single view of the customer has become critical to customer journeys, and the drive to get this in place has only accelerated with the COVID-19 pandemic. In 2019, retail ecommerce sales reached \$3.35 trillion, representing 20.2% growth from 2018. In 2020, it grew 27.6%, reaching \$4.28 trillion.¹ The rapid growth in ecommerce has heightened the need for real-time insights to accommodate how quickly customer behaviors change, especially under the radically different social conditions we have experienced in the past 12 months. In a time of crisis, it is particularly important for marketers to provide customers with personalized, relevant communications that simultaneously consider the broader context. Increasingly, consumers also expect instant responses from the brands and companies with which they interact, which demands

data-driven intelligence and agility. Data-driven marketing also provides the foundation for enhancing customer experience and loyalty.

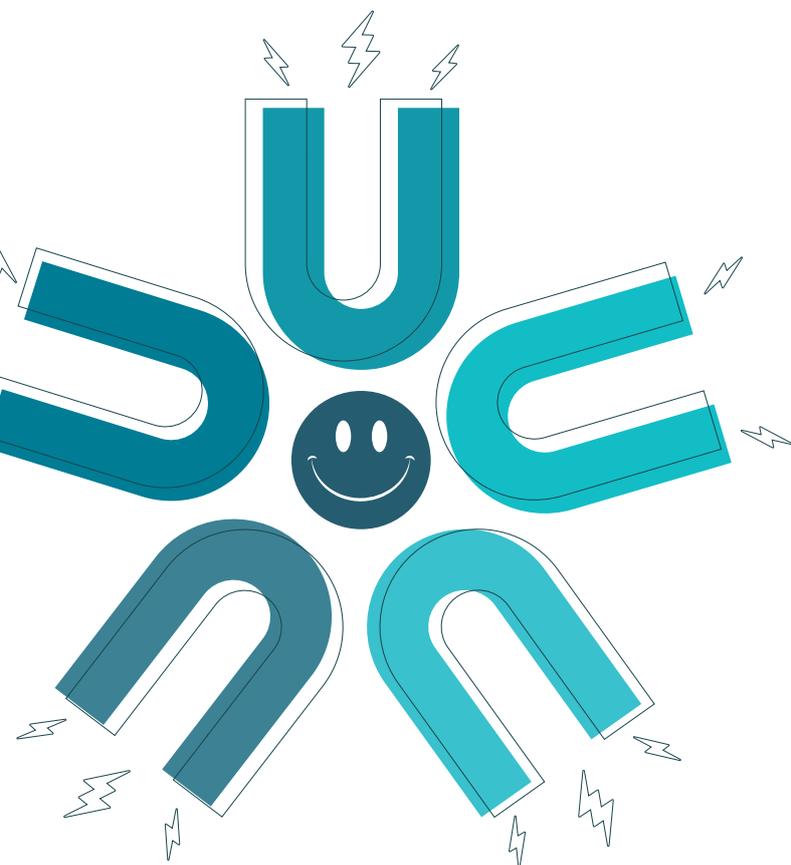
But are chief marketing officers (CMOs) and their marketing teams realizing the full potential of data-driven marketing? Is the marketing function sufficiently data-driven to be able to conduct real-time marketing? How mature are in-house marketers in using data and technology to enable a better understanding of new consumer behaviors and insights, and can they respond appropriately and quickly enough?

To answer these questions, we surveyed 1,600 marketing executives from around the world with a business-to-consumer (B2C) focus and representing a range of industries, including automotive, banking, consumer goods, insurance, retail, telecom, and utilities. We also conducted in-depth interviews with 25 CMOs and other marketing executives.

As we detail in this report, we found that CMOs understand the imperative to become more data- and real-time-driven, but most marketing functions do not have the capacity to deliver results in a short time frame.

In this report, we focus on four key areas:

1. How data and technology enable marketing to achieve its potential as a growth driver and fulfill a broader, more holistic role in a digitally disrupted environment
2. The obstacles that stand in the way of data-driven marketing
3. What distinguishes data-driven marketers and the benefit case for being data-driven
4. Key recommendations for how CMOs can take full advantage of data and insights



EXECUTIVE SUMMARY

– KEY TAKEAWAYS

Data enables marketing to achieve its potential as a growth driver

Over time, the role of the CMO has evolved beyond the traditional remit of brand-building to become more holistic. CMOs are now responsible for a wide range of activities, including data and technology, business strategy, business growth, and customer experience. Marketing has never been more integral to the business. Over half (57%) of marketers agree that their C-suite executives now see marketing not as a cost center but as a strategic partner in driving business growth. Given the growing importance of ecommerce and the need for marketers to understand how customers interact with brands and companies (and to know when and where to engage with them), real-time marketing can be a key enabler for CMOs to deliver on this broadened mandate. Real-time marketing allows marketers to collect relevant customer data, make quick decisions along the customer journey, be more proactive in engaging customers, support customized content, and enhance the ecommerce experience.

The marketing function falls short of being data-driven

Challenges in capabilities, access, and talent are hindering marketers from using data to drive business decisions and strategy. For example, only 43% of marketers say their teams use data to decide on a go-to-market strategy for a new product or service and just 45% say they have a customer-data platform that provides a unified single view of the customer. Availability of and access to data is also a problem for marketing teams. Forty-nine percent of marketers say they use technology such as artificial intelligence (AI) to automate customer segmentation and grouping; however, only 38% say that customer segment and persona data is available to them. In addition, only 44% say they have an adequate supply of skills in areas such as AI and machine learning, or data analytics and data science. And less than half (45%) say they have social digital-marketing skills.

What data-driven marketers do differently and the benefits of a data-rich approach

From our research, we identified a cohort of “data-driven marketers” by assessing all respondents against two broad dimensions: data-related factors and technology-related factors. We found that only 11% qualify as data-driven marketers and they outperform the rest of the organizations in four key areas:

- They can drive effective real-time marketing initiatives and extract high value from their use
- They realize better business outcomes from real-time
- They have well-rounded skills and expertise, including better category and customer understanding, data-driven skills, and soft skills such as agility and emotional intelligence
- They foster creativity more effectively across a broad range of areas, including customer engagement, personalization, and content.

How can CMOs take full advantage of data and insights?

Drawing on our research and experience, we believe six focus areas are critical to ensuring CMOs are prepared for the future in a data-driven marketing environment:

- Create a clear vision for the marketing strategy
- Implement a framework-driven data-collection process
- Ensure talent is equipped with a baseline of data and creative skills while allowing for specialists
- Accelerate collaboration across the marketing ecosystem
- Reimagine the customer journey with real-time engagement
- Integrate long-term brand building and short-term marketing engagements.

What is data-driven marketing and real-time marketing?

For the purposes of this research, we define data-driven and real-time marketing as follows.

Data-driven marketing is the approach of driving marketing strategies, campaign initiatives, and content based upon analysis and insights derived from customer data, including customer interactions and engagements. Data-driven marketers process, analyze, and leverage data to fine tune campaigns and content and marketing outputs. By taking a data-driven approach, they also gain deeper understanding of consumers and trends and target consumers with personalized and relevant offers and services

Real-time marketing is marketing performed at the moment, with an appropriate approach as suited to the customer, and relevant to the time and place while still driving the brand value proposition. Data-driven marketers lead in real-time marketing with their data-driven capabilities and ability to respond quickly thereby driving real-time customer experience as suited to each customer’s needs, wants, and behavior.

DATA ENABLES MARKETING TO ACHIEVE ITS POTENTIAL AS A GROWTH DRIVER

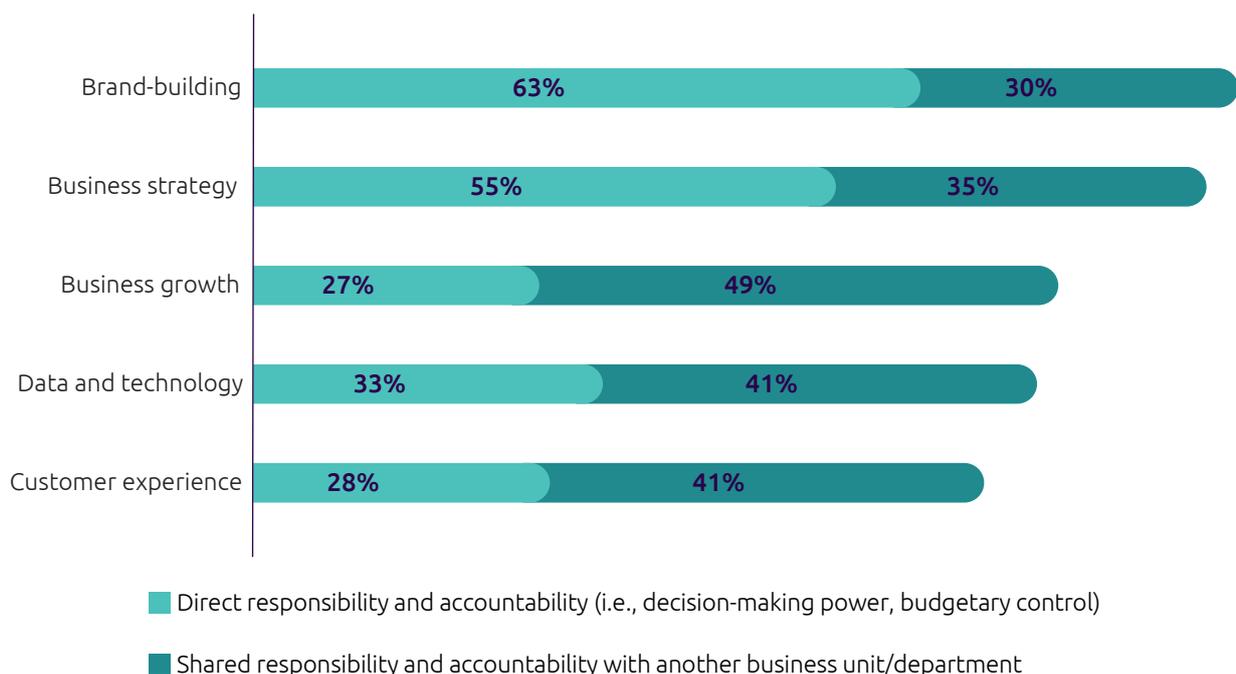
The CMO mandate has expanded beyond traditional brand-building

The role of the CMO has evolved in new directions and become more holistic. The traditional marketing mandate is seen as brand-building, from brand-marketing strategy to budgeting and ROI, but today's marketing leaders have additional strategic responsibilities:

- 90% of CMOs currently say they are responsible (either directly or shared) for business strategy, such as defining and launching new products and services.
- Close to three-quarters (74%) have a responsibility for data and technology, business growth (i.e., revenue and profit contribution), and customer experience (see Figure 1).

Figure 1. The CMO remit has broadened to become more holistic

Percentage of CMOs who say they are currently responsible for the following functions/competencies



Source: Capgemini Research Institute, CMO survey, March–April 2021, N=224 chief marketing officers.

The CMO is involved in business strategy and business-model innovation: The vast majority (90%) of CMOs now have some level of responsibility for business strategy and its tactical execution:

- 63% of CMOs are directly responsible for defining and conceptualizing new products and services, with another 29% sharing responsibilities.
- 59% say they are responsible for building/launching new products and services and 31% say they share responsibilities.
- 43% have pricing new products and services within their mandate and 44% share responsibilities.

Data and technology responsibilities are widespread: Nearly three-quarters of CMOs say they have some level of responsibility for data and technology:

- 36% of CMOs say they are directly responsible for overseeing marketing technologies such as customer relationship management (CRM) tools or marketing-automation platforms and 45% share responsibilities.
- 33% say they manage customer data, with another 40% sharing responsibility.
- 29% manage marketing analytics used for identifying patterns or tracking performance within their mandates and 38% share responsibilities.

Sharon Driscoll, CMO for global markets at IBM, elaborates on how data has transformed her responsibilities:

‘Significant’ would describe how my responsibilities as CMO have evolved over the past few years. The use of data has enabled us to become real-time stewards and activators of our brand, as opposed to being passive observers of our brand. The ability to come to the table with knowledge that our developers and R&D teams, for example, didn’t have, is a game-changer for us. Marketing comes with expertise and a market dimension no-one else has – real-time behavioral monitoring – and our value to the organization has greatly increased.”

CMOs have accountability for customer experience: Sixty-nine percent of CMOs are responsible for certain elements of customer experience: 28% are directly responsible and 41% hold shared responsibilities. And, 58% of them agreed that they have increasing accountability to own the customer experience at their organizations.

- 33% of CMOs say they are directly responsible for gathering and understanding consumer and market intelligence, trends, and insights, and 47% share responsibility.
- 32% say they manage loyalty programs, with another third sharing responsibility.
- 20% say they are directly responsible for managing end-to-end customer experience across touchpoints (e.g., stores/dealers, social media, web/apps) and another 53% share responsibility
- A quarter of CMOs are directly responsible for managing customer feedback (e.g., customer service, social listening) and another third share responsibility.

CMOs are also seen as business-growth drivers: Over three-quarters (76%) of CMOs are responsible for business growth (i.e., contributing to revenue or profit) – either directly or as a shared responsibility.

- Our research also shows that nearly 60% say they are involved in critical decisions related to growth and long-term value, such as growth strategy and new product development. Janneke Tranas Marino, senior vice president, private market and customer experience at Gjensidige, a Norway-based insurance firm, says: *“The CMO has transitioned from leading static campaigns to now creating moments of trust in the customer journey. Marketing sits closer to the business processes and has a stricter focus on business strategy, opportunities, and challenges.”*
- Over half (57%) of marketers also say their C-suite executives see marketing as a strategic partner in driving business growth, and not solely as a cost center. Karolina Henriksen, executive vice president of red meat at Nortura, a food manufacturer and meat and egg supplier in Norway, has full profit and loss (P&L) responsibility for sales and marketing. She says: *“My top priority is driving sustainable growth and profitability, since we are in a pretty mature market with external forces at play, such as reduced red-meat consumption.”*

CMOs can use data-driven marketing to deliver faster and more precisely

Given its broadened role, marketing is more integral to the business than ever before. At the same time, digital disruption has transformed markets and the way in which brands and companies interact with consumers. Online sales especially generate a significant volume of data for organizations about whether their customers like products they purchased, their browsing habits, and products abandoned in shopping carts, which organizations can use to guide varied decisions. US-based retailer Target has a focused approach to use customer data generated from online sales to drive decisions in functions such as marketing, sales, and supply chain. For example, the retailer uses online customer data to guide product placement in stores.²

Data mastery – extracting meaningful insights from deep data analysis to shape marketing decisions and customer activation – will be critical to CMOs' success in this broadened role. For example, data and technology are a key part of Rav Dhaliwal's role as chief marketing and digital officer at easyHotel, a UK and pan-European hotel chain. He says: *"My role is split between marketing, digital, and ecommerce. I also oversee all the digital technology that we implement in marketing. I think this dual CDO/CMO role has been increasing in prominence over the last few years. Owing to the amount of customer data that flows through our digital ecosystem and infrastructure, a hybrid role is critical."*

In companies with more mature data capabilities, data can offer a way to continue to make an impact. IBM's Sharon Driscoll shares how data capabilities increased her team's prominence: *"I have a very different marketing team from just three years ago. Marketing wasn't always seen as an integral driver of the company's success; it was R&D, product management, and sales. Marketing is now consulted and our data – particularly behavioral data within accounts showing trends and patterns that are not always observable by sales – has given us a seat at the table."*



Being data-driven in marketing and gaining access to real-time data allows you to be faster."

Elise Bert Leduc

Chief marketing, customer, digital, data and partnerships officer at AXA Insurance, France



Real-time marketing can enable CMOs to deliver a competitive differentiator through actioning data and insights instantly

Real-time marketing, as we defined before, is marketing performed at the moment, with an appropriate approach as suited to the customer, and relevant to the time and place as suited to the brand. Real-time data that is collected and delivered immediately to create insights and shape quick decisions is critical for real-time marketing. For example, if a customer purchases a product or abandons their shopping cart, a company can use real-time data to propose a new offer immediately or initiate a conversation with the customer. The idea of using data to drive personalization and improved customer targeting is not new. However, some of the capabilities in real-time marketing are genuinely innovative: for example, capturing customer emotions in the moment and responding immediately, as opposed to recognizing the problem only after the customer has switched brands. These real-time capabilities also allow for a proactive rather than reactive response.

Making the ecosystem of real-time marketing work requires effective data sources, data feeds, and analysis, marketing technologies, marketing operations, and suppliers and partners all working effectively together to deliver optimal real-time experiences. The ability to collect and process data into analysis, trigger actions, capture feedback and respond in the moment is critical for a number of reasons:

- **Real-time interactions enable quick decision making in the customer journey:** Real-time marketing, and when interactions are actioned upon, can help marketers arrive at quick decisions in the customer journey. For example, to position personalized products and services or adapt or change marketing content based upon data and insights received at the moment. Elise Bert Leduc, chief marketing, customer, digital, data and partnerships officer at AXA

Insurance, France says: *“Being data-driven in marketing and gaining access to real-time data allows you to be faster. You gain access to continuous feedback, rather than having to organize a focus group or some other formal initiative. It enables you to be more agile, so you can quickly redesign and adjust your campaigns as needed.”*

- **Real-time marketing drives “proactive” customer engagement and enables “instant” feedback:** Real-time marketing helps organizations capture customer emotions, wants, and needs of the moment and react immediately. For example, a quick response on Twitter by US fast-food chain, Wendy’s, to a user who asked how many retweets he needed to get free nuggets for a year gained huge popularity and traction that the brand added 1.2 million new followers on the social media platform by the end of that year.³ Overall, 52% of marketers in our survey believe that real-time marketing is important in enhancing the customer experience.
- **Real-time engagement can help deliver personalized content and responses:** Customized and contextually relevant content can be created when customer behavior data is collected at the moment. Some examples include:
 - After customers use a third-party automated teller machine (ATM), Fifth Third Bank immediately sends a message informing them that their bank’s ATM is only a few blocks away and they can save on withdrawal fees, which customers would have to pay when using a third-party bank.⁴
 - Zappos, the US online shoe and clothing retailer, sends an e-mail response to customers immediately after product delivery, with an image of the items that were delivered and a short quiz inviting their feedback.⁵
 - Likewise, if a Netflix customer logs in late at night, the platform recommends already-watched shows or shows with a shorter duration to the customer instead of longer shows.⁶

- **Real-time customer engagement enhances the ecommerce experience:** Real-time data when activated with an appropriate framework to arrive at insights, helps to enhance the ecommerce experience. For example, Katarzyna Jezierska, head of marketing at Visa for Central Eastern Europe, shares how her organization uses real-time marketing and data during a customer’s ecommerce journey: *“Our real-time marketing solutions depend on the specific situation and specific need of the consumer. We start with consumer education about the pros and cons of different payment methods, do marketing together with our ecosystem partners, on a variety of solutions including click to pay, mobile wallets, and direct card payments that can address the different needs of both consumer as well as ecommerce seller.”*
- **Real-time marketing helps to ensure a clear strategy on “knowing your customer”:** Organizations are now focused on collecting “zero-party” data, where the customer intentionally shares information directly with the brand for a value exchange. First-party data is data that organizations collect about their customers when they are browsing their websites, while zero-party data is where organizations directly approach their customers for their data. Zero-party data is becoming more important as third-party cookies are phased out, where third-party domains tracked users’ online behavior previously. David Dintenfass, CMO and head of experience design at Fidelity Investments, pinpoints how they reached a new customer group: younger customers interested in “meme stocks” (i.e., investing based on what they hear on social media). For instance, they recently held their first-ever “Ask me anything” forum on Reddit and collected insightful data directly from this younger customer base for their campaigns.⁸

However, organizations need a combination of data-driven capabilities: a framework for collecting customer data, a single view of the customer, the required talent and skills and technologies, such as AI to drive actions through real-time data. In the next section, we investigate whether organizations are truly equipped with these capabilities.



The benefits of real-time marketing are the impact that we create on customer behavior, translating into specific business outcomes.”

Katarzyna Jezierska

Head of marketing at Visa for Central Eastern Europe





CMO Perspectives

Aina Lemoen Lunde

Executive vice president, marketing and digital sales at DNB, a Norwegian financial services company

The Capgemini Research Institute spoke with Aina Lemoen Lunde, executive vice president, marketing and digital sales at DNB, a Norwegian financial services company, to explore how her marketing function is organized and the skills challenges she faces as CMO.

What is your mandate today?

"I have responsibility for marketing across the DNB group, our business-to-business markets and our consumer mass markets, both domestic and international. Two years ago, we underwent a reorganization, where we moved digital sales into marketing. Now, I also have responsibility for digital sales in our mass markets, so I have to answer for the commercial results."

How have you organized your marketing function to deliver against your broadened remit and the increasing importance of data and technology?

"We are organized into three marketing teams and five support sections. One team focuses mainly on the mass markets within loans, property insurance, and everyday banking. Another team focuses on investment and savings and also private banking. And the third team focuses on B2B and international. Our sections cover five areas: data (data stewards and data scientists), marketing technologies; DNB Creative, which is our in-house agency for production; insights and analytics; and customer value creation from non-financial products and partnerships. I have a lot of digital specialists on my team who are deeply interested in digital marketing, data, and technology."

Managing a team of specialists, what is the top challenge you face?

"Translating marketing to the rest of the organization can be a challenge when you have lots of specialists. To that end, each year, we offer a marketing masterclass that everybody in the marketing division has to take. This ensures we all speak the same language and helps us to be better translators of our profession to the wider organization. We also do a lot of sharing, so our digital specialists can share their knowledge with other team members in marketing as well as within other functions."

Are there any particular skills that are difficult to find today?

"Marketing leaders that have well-rounded skills are the hardest people to find right now. Leaders that are skilled in the use of data-driven tools and methodologies, proficient in marketing strategy and implementation, can lead teams effectively, and are able to translate the profession to stakeholders across the organization."

Source: Capgemini Research Institute interview with Aina Lemoen Lunde, DNB, March 2021.

The future marketing partnership model is moving in-house

The majority (81%) of marketers say their team partners with agencies for activities such as branding and marketing strategy and digital marketing. And, in the next two to three years, 43% of marketers plan to bring this work in-house.

Sixty percent of marketers partner with data providers (e.g., market-research firms that provide datasets such as customer-spending data or demographics) and 57% with advertising/media agencies (e.g., for media/audience planning, communications/branding, offline/online advertising). While slightly under half (46%) of teams work with marketing-technology firms (e.g., cloud marketing, CRM), Today, 24% say they will bring that capability in-house within the next two to three years (see Figure 2).

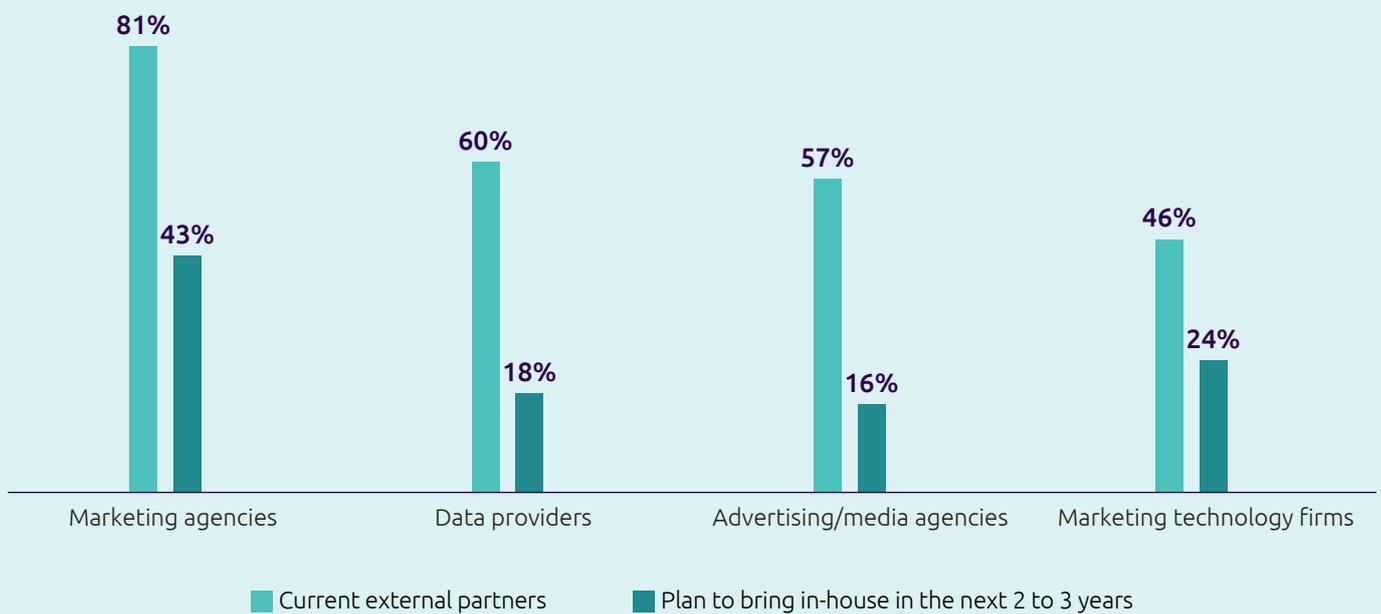
There are significant implications for both capabilities and skilling in relation to bringing this work in-house. Overall, half of marketers agree that their organizations are increasingly trying to build internal skills and capabilities over partnering with outside vendors. Cyrille Giraudat, senior vice president of marketing, digital, and technology at RATPDev, a French public-transport company, says: *"We often leverage and source solutions from the market but, for some specific use cases, we design our own solution internally. For example, for real-time multichannel campaigns, we designed a solution for push notifications since we did not find a proper external solution. We are able to customize our multichannel approach for each customer profile and send notifications directly from the operational center and our teams that are closest to the customer."*

Neeraj Bhalla, vice president digital at Mahindra Group, an Indian multinational, says they work on a hybrid approach with key capabilities built in-house: *"Our real-time marketing stack, including the platform and marketing cloud, is built on a popular enterprise cloud platform and is connected seamlessly with our dealerships and contact centers. We have campaigns delivered by agencies but we monitor the campaign efficiency and outcomes in real time, and we decide the call to action."*

Based on our research and experience in the field, the integration of functions in-house will likely continue but it will take on a hybrid approach, with capabilities in-house and agencies supporting. This model could offer companies greater access to talent and control of cost and performance. Unilever set up its in-house digital agency, U-Studio, to increase the volume and turnaround time of real-time, high-quality content. It operates a hybrid model, with the majority of its staff hired from an agency specializing in digital marketing, working alongside Unilever marketers.^{9 10}

Figure 2. 81% of teams partner with marketing agencies and roughly half anticipate bringing that work in-house

Percentage of marketers that say their marketing team partners with the following external organizations and whether they plan to bring the work done by the external partner in-house in the next 2 to 3 years



Source: Capgemini Research Institute, CMO survey, March–April 2021, N=1,600 marketers.

43%

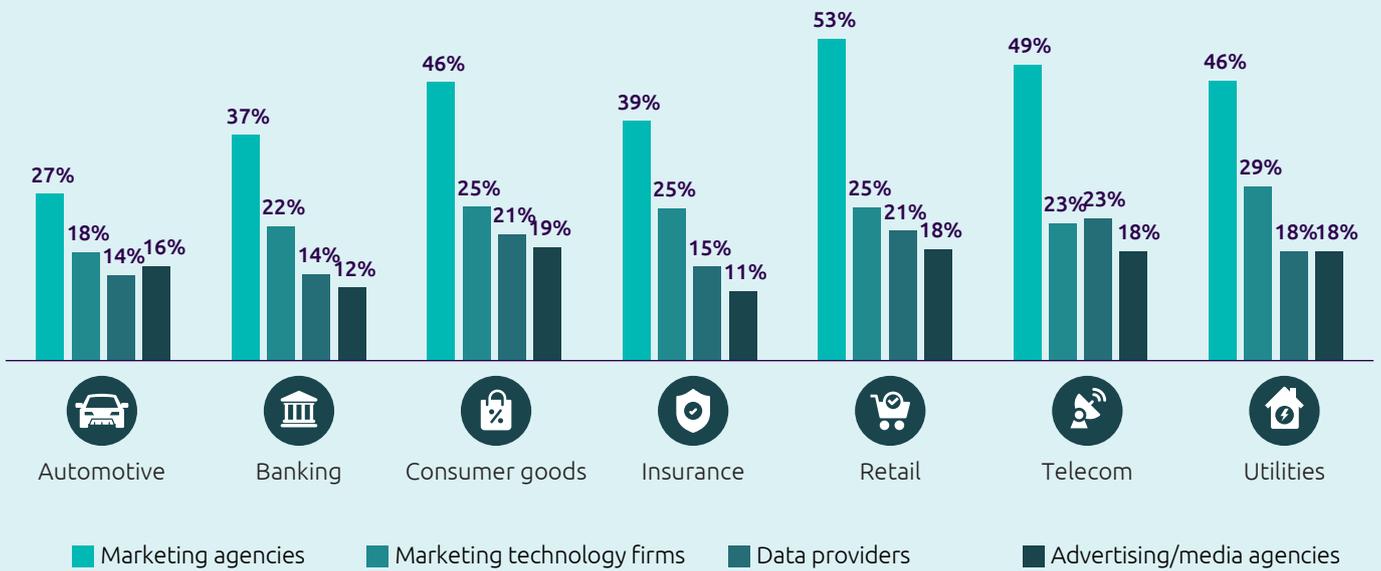
The percentage of marketers that plan to bring the work done externally by marketing agencies in-house in the next 2 to 3 years.

By sector, a greater percentage of marketers in consumer goods, retail, telecom, and utilities that anticipate bringing

the work done by their marketing agencies in-house is above average (see Figure 3).

Figure 3. 53% of retail marketers anticipate bringing the work done by marketing agencies in-house

Percentage of marketers by sector that say they plan to bring the work done by the external partner in-house in the next 2 to 3 years



Source: Capgemini Research Institute, CMO survey, March–April 2021, N=1,600 marketers.

THE MARKETING FUNCTION FALLS SHORT OF BEING DATA-DRIVEN

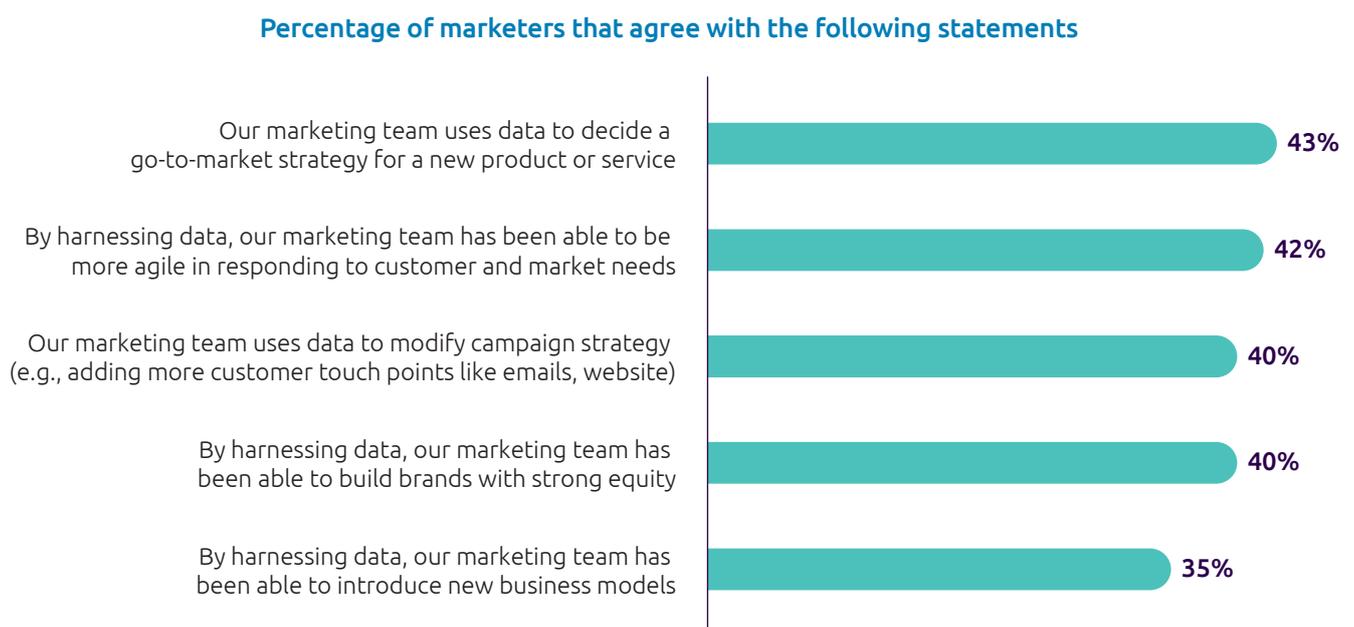
Marketers are struggling to effectively use data to drive marketing decisions and actions

Overall, less than half of marketers say they currently use data to drive marketing decisions and actions. For example, only 43% of marketers say their teams use data to decide a go-to-market strategy for a new product or service (see Figure 4). This is even lower when we look at the findings at sector level, dropping to 37% in automotive and 25% in utilities.

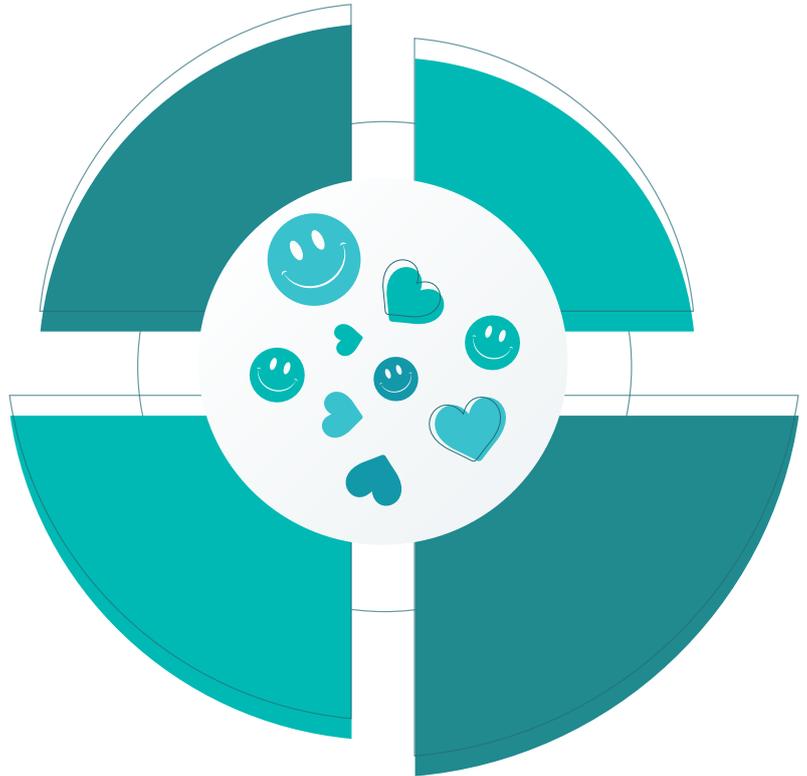
We also found that only 42% of marketers say that, by harnessing data, their team has been more agile in responding to customer and market needs.

- By sector, only 24% of marketers in utilities agree with the statement.
- In contrast, larger companies are faring better. Over half (52%) of companies with greater than \$20 billion in revenue agree.

Figure 4. Less than half of marketing teams drive decisions by harnessing data



Source: Capgemini Research Institute, CMO survey, March–April 2021, N=1,600 marketers.



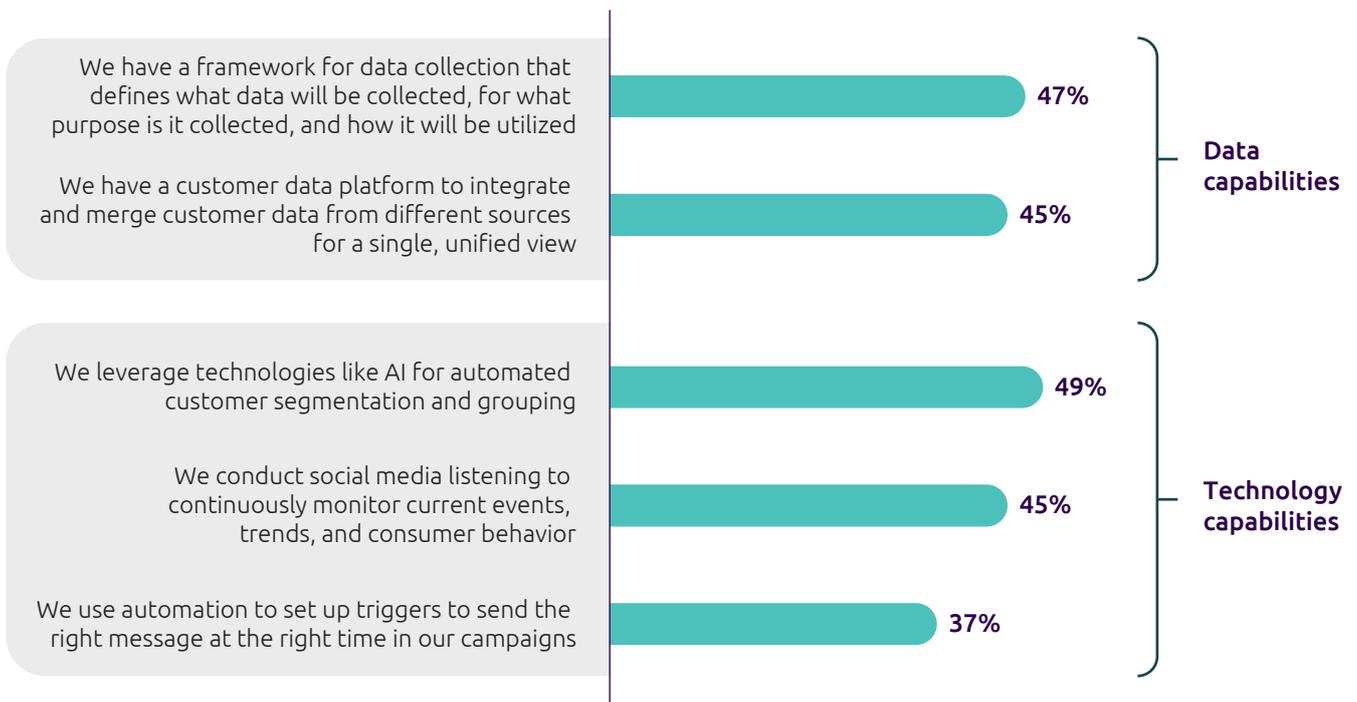
Marketers have a capability deficit

Less than half of marketers say they have built the data and technologies capabilities needed to deliver data-driven marketing. For instance, only 45% of marketers say they have a customer data platform that provides a unified and a single

view of customers (see Figure 5). By country, marketers in Spain (61%) and Germany (59%) lead among others in having a customer data platform, while Italy (19%) and India (31%) rank the lowest.

Figure 5. Less than half of marketers (45%) have a customer-data platform that allows for a single view of customers

Percentage of marketers that agree their organizations have the following marketing capabilities



Source: Capgemini Research Institute, CMO survey, March–April 2021, N=1,600 marketers.

The CMOs and marketing executives that we spoke to pointed to a couple of key challenges that impact their ability to develop data and technology capabilities:

- **Online-offline integration:** Hyewon Lee, vice president of marketing and communications from Swarovski, North America, one of the leading fashion jewelry brands, points out that the transition from digital to offline is a challenge: *“It is important to have an integrated view of the customer, and this can be easily achieved in digital channels because we track and follow digital. However, once the customer steps into offline channels, the understanding stops. This is because there is no integrated customer funnel between online and offline channels.”*
- **Siloed data sources:** Peder Apelgren, chief digital officer of Clas Ohlson, a Swedish home-improvement chain, points out that disparate data sources can make it difficult to build a unified view of the customer: *“We still have some way to go in order to create a 360-degree view of the customer and be more sophisticated in our modeling and segmenting of the customer. We have a technical gap to close: customer data is spread out in the organization and in different source systems. This can make it difficult to draw conclusions and conduct analyses.”*
- **Investment challenges:** Manuel Lorimier, ecommerce and customer marketing retail director at French food manufacturer, Andros, shares that his team must make investment trade-offs that challenge the ability to be fully data-driven: *“My organization is a family company, so team size and budgets are limited, and we have to make choices based on trade-offs. It can be complex. We have to make a stronger case for investing in data because, overall, the mindset is that data is not considered a direct revenue generator.”*
- **Outdated mindset:** Swarovski’s Hyewon Lee points out that an outdated mindset, particularly among traditional marketers, can make it difficult to bring about a data-driven culture: *“Compared to the past, where marketing was mainly about advertising, today it is much easier to be a data-driven marketer because of the availability of tools and technologies, especially when it comes to tracking consumer behavior. However, the challenge is how to change the mindset and behaviors of traditional marketers, who did not previously use these tools, and encourage them to embrace these new technologies.”*
- **Broad organizational commitment required:** Mehdi Tabrizi, CMO at Moda Health, a US-based health-insurance provider, emphasizes the need for commitment to a data-led approach across systems: *“We are actively enhancing our data-related capabilities, specifically to translate data into actionable insights. We are not quite at an advanced level yet. It requires investment, commitment of resources, expertise, structure, and systems. It takes time to establish a data-management system, build the layers of algorithms, and then have the expertise and skill sets to be able to work on it in order to extract the necessary insights.”*



[We face] a challenge of measuring too many things that aren't providing enough real insights in a rapidly changing world.”

Karolina Henriksen

Executive vice president of red meat at Nortura



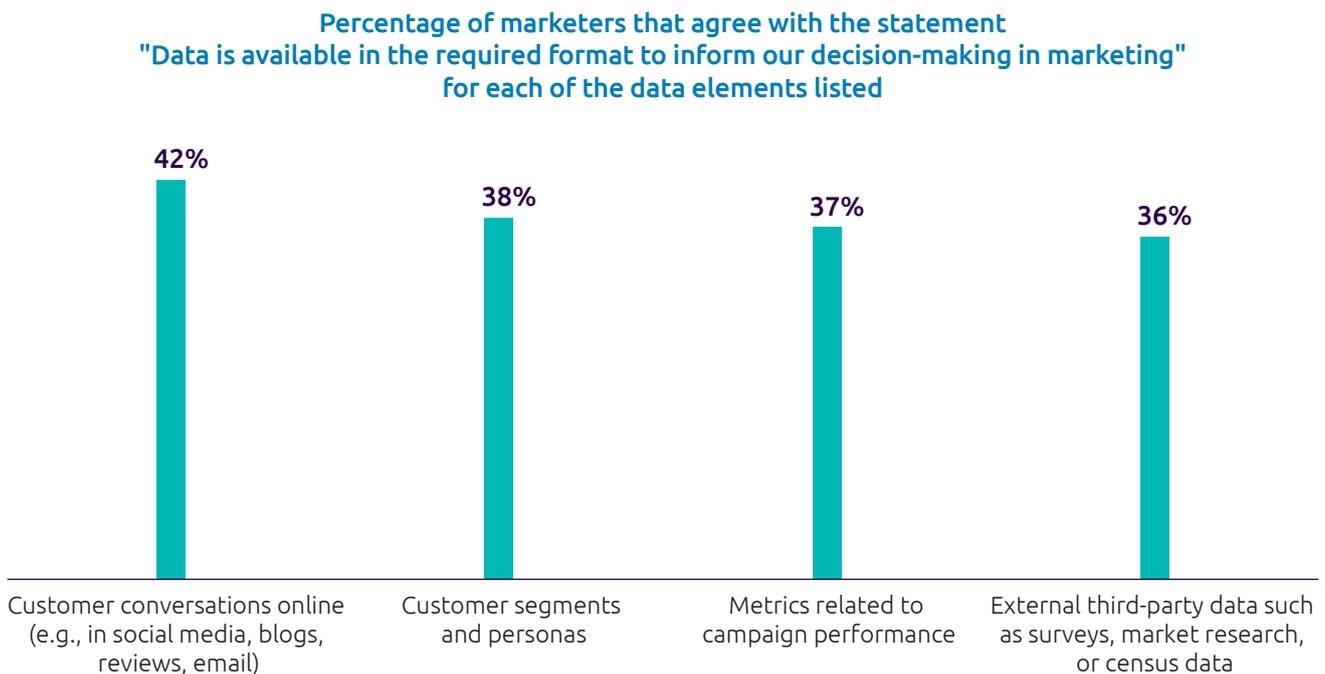
Data is not readily accessible to marketing

Data collection is a key challenge for organizations. In our previous research into the data-powered enterprise, we found that technology executives are unfamiliar with the concerns of business users around data visibility, access, and insights.¹¹

Availability of and access to data is a problem for marketing teams, as well. Often, even if they have the smart technology (such as AI) to do their job, they do not have the data ingredients. For example, 49% of marketers say they have technology such as AI to automate customer segmentation and grouping. However, only 38% say that customer segment and persona data is available to them (see Figure 6).

The data availability and access challenge can also be attributed to the fragmented nature of customer data and the lack of a central customer data platform that aggregates and organizes customer data coming from an increasing number of sources across geographies, brands, and internal systems. As shown above in Figure 5, we find that only 45% of marketers say they have a customer-data platform to integrate and merge data from different sources.

Figure 6. Only 38% of marketers say they have “customer segments and personas” data in the required format to aid decision making in marketing



Source: Capgemini Research Institute, CMO survey, March–April 2021, N=1,600 marketers.

Pritendra Chawla, previously senior marketing director at Procter & Gamble Consumer Health, points to the data-availability challenge: *“There is actually a lot of data, but it is limited to the touchpoints leveraged by a company. Let’s say a team makes significant use of TV advertisements for healthcare, details their product to doctors, and distributes it via retail stores. Data availability then will likely be limited to TV, healthcare practitioners and from stores, and not capture e-commerce or tele-medicine trends, for instance. You could argue that the team might miss the boat if they do not watch e-commerce as closely.”*

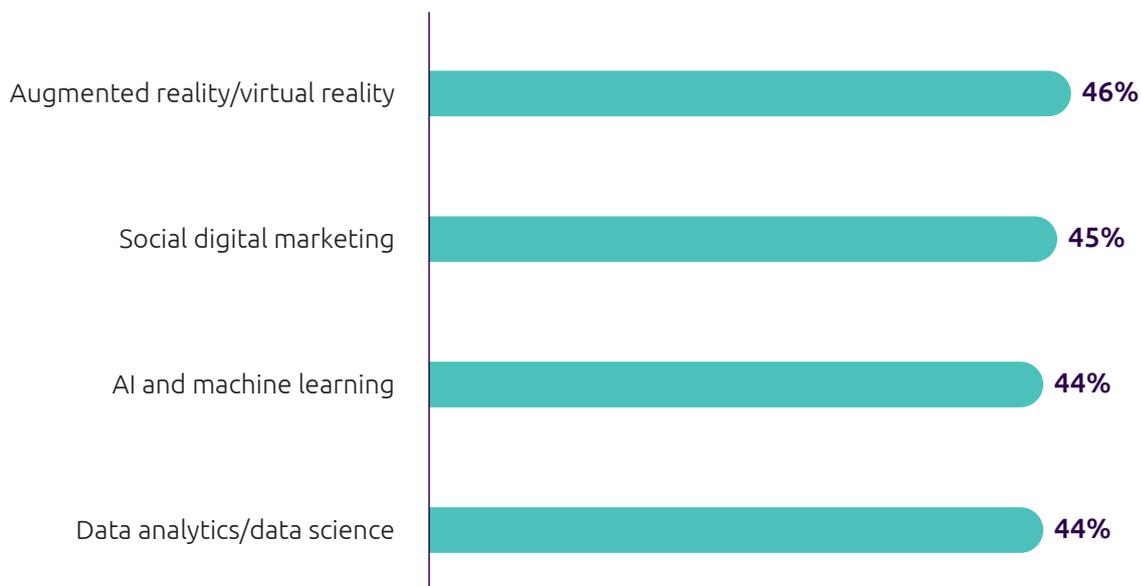
Some CMOs also see a challenge in extracting value from the data to which they do have access. Nortura’s Karolina Henriksen says: *“We purchase nearly every set of data we can, from brand loyalty to brand strength, to Nielsen data, and we do conjoint analysis, price-sensitivity analyses, focus groups for every launch. It’s just too much data. The problem is that all of this data needs more structure and more systematic analysis to make it more actionable and efficient. It’s a challenge of measuring too many things that aren’t providing enough real insights in a rapidly changing world.”*

There is a skill gap for technical talent in marketing

Marketers are yet to catch up on many important technical and digital-marketing skills. Only 44% say they have an adequate supply of skills in areas such as AI and machine learning, or data analytics and data science. And less than half (45%) say they have social digital marketing skills (see Figure 7).

Figure 7. Only 44% of firms say they have sufficient data science or AI/machine learning skills in their marketing organizations

Percentage of marketers that agree with the statement: "We have an adequate supply of this skill in my marketing organization"



Source: Capgemini Research Institute, CMO survey, March–April 2021, N=1,600 marketers.

Fidelity Investments' David Dintenfass says that his organization focuses on both recruitment and internal skill development to fill gaps: *"There is a war for digital talent in every industry as they go through a digital transformation. We have focused on bringing talent in, as well as developing our existing talent. There is always a need for talent that can create*

good customer insights and synthesize information to deliver better solutions for customers. So, being digital, being analytical, understanding the business and being able to apply that to deliver a better solution for customers is in demand."



CMO Perspectives

Peter Markey

Chief Marketing Officer at Boots UK, a health and beauty retailer and pharmacy chain

The Capgemini Research Institute spoke with Peter Markey, CMO at Boots UK, a health and beauty retailer and pharmacy chain, to explore the challenges he faces as CMO today and his vision for the future.

What marketing priorities has the pandemic influenced?

“It has been a balance between two: store and ecommerce. The store remains key to us, as we have remained open throughout the pandemic because of the pharmacy and essential services we provide. As we see more and more customers return into stores as lockdown eases, our priority remains ensuring the in-store experience is safe and clean and we create a great in store customer experience.

We also have a number of stores providing COVID-19 testing and COVID-19 vaccinations, which provides another opportunity for us to build a stronger relationship with our customers – something, for example, we already do through the Boots Advantage Card. Our digital presence is also a real priority and making sure the end-to-end experience is strong. That means from order to delivery or collection within the store. We have invested in the ecommerce experience and are seeing success with our dot.com business up over 100% year on year.”

Are there any key skills that are hard to find today?

“The combination of technical ability and a mindset geared to working at speed and in real time within a retail setting is challenging to find. For example, talent skilled in responding quickly, using creativity in a more dynamic and more relevant way when creating messages and offers for customers. Also, analytical skills and being able to extract data and insights in a

timely manner from tools such as Adobe Campaign or Adobe Target are hard to find. And finding people who can take those insights and build a program and set up campaigns at speed is a challenge. These are the skills and competencies I think are harder to find at the moment.”

How do you envision the CMO of the future? What competencies will he or she need?

“The modern CMO needs to be three things simultaneously: an artist, a scientist, and a champion. For the artist, it is being a creative thinker; being able to interpret creative work, to work with creative agencies. It is also about understanding what makes great creative ideas. The second one is being a scientist and knowing the numbers that drive the business; being very in tune with the results; having a deep understanding of data; and being very analytical in your approach. The champion role often gets forgotten. This is about being a champion for your function; to tell the narrative of what your function is there to do.”

WHAT DATA-DRIVEN MARKETERS DO DIFFERENTLY AND THE BENEFITS OF A DATA-RICH APPROACH



Data is a huge priority. I don't think you can be effective in marketing without the effective use of data. Increasingly, we are trying to bring access to data across the firm to better serve our customers."

David Dintenfass

Chief marketing officer and head of experience design at Fidelity Investments



Given the significant challenges that stand in the way of data-driven marketing, we wanted to understand which organizations were further evolved in terms of data use, so that we could identify what these marketers do differently and the benefits they are able to attain. For this, we identified a cohort – the “data-driven marketers” from our research – by assessing all respondents against the following

critical data and technology dimensions. As Figure 8 displays, data dimensions show the foundations in place to drive data capabilities and technology dimensions shows the use of platforms, tools, technologies, and IT support to activate data.



Figure 8. Elements for data-driven marketers

Data dimensions	
Data importance	<ul style="list-style-type: none"> • Critical importance of data to the marketing function • Using data for go-to-market strategy; content; optimizing media mix; retargeting campaigns
Data availability and gathering	<ul style="list-style-type: none"> • Implementing a framework for data collection • Collecting customer data from different touchpoints • Data availability (e.g., on consumer awareness, preferences, feedback, online conversations) in the required format to aid decision making • Detecting cross-channel interactions of consumers and social media listening
Cross-functional collaboration	<ul style="list-style-type: none"> • Extent of collaboration between marketing and different functions on sharing data including sales, after sales, supply chain, operations, finance, IT
Technology dimensions	
Platforms and tools	<ul style="list-style-type: none"> • Having a customer data platform for unified view • Using marketing automation and content management platforms • Using AI and analytics tools for customer segmentation, grouping and for managing and monitoring campaigns • Deploying automation tools to send messages at the right time
Marketing and IT collaboration	<ul style="list-style-type: none"> • Alignment between marketing and IT on building cross-functional teams, developing talent strategies, developing a growth and transformation roadmap and pace of implementation

Source: Capgemini Research Institute analysis

After assessing marketing functions against the above dimensions, we found that only 11% qualify as data-driven marketers. These marketers outperform the rest of the organizations in four key areas:

1. They drive effective real-time marketing initiatives and derive high value from their use.
2. They realize better business outcomes from real-time marketing.
3. They have well-rounded skills and expertise, including better category and customer understanding,

data-driven skills, and soft skills like agility and emotional intelligence.

4. They foster creativity more effectively across a broad range of areas, including personalization, customer engagement, and content.

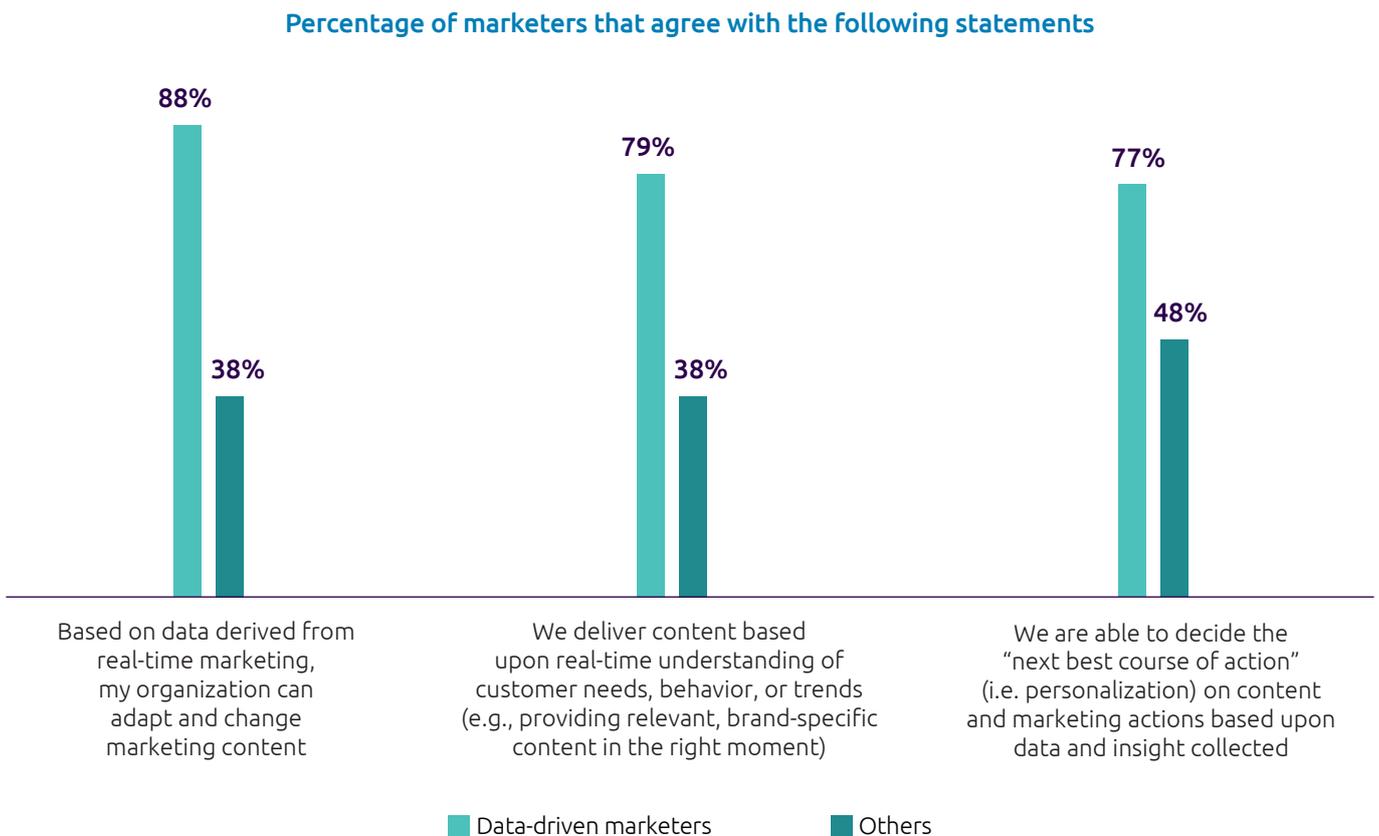
These data-driven marketers are confident in delivering at speed and consider their skill sets as a major competitive advantage. They think that they are more creative and build their brands more efficiently than competitors.

Data-driven marketers execute real-time marketing and drive significant value as a result

Real-time marketing requires deciding on the next best course of action based on the customer response to the preceding action. For example, to position personalized products and services or to deliver content at the right time “proactively,” based upon real-time understanding of customer actions and behavior. These are areas where the data-driven marketers have an edge. Eighty-eight percent

of these marketers say they can adapt and change content based on real-time data (versus only 38% of other marketers) and 79% also say that they can deliver content based upon real-time understanding of customer needs (compared to 38% of other marketers). In addition, 77% say they can decide the next best course of marketing action based upon data and insights collected (see Figure 9).

Figure 9. Data-driven marketers deliver and adapt relevant content and decide “next-best actions,” which are some capabilities required to deliver real-time marketing



Source: Capgemini Research Institute, CMO survey, March–April 2021, N=179 data-driven marketers; N=1,421 other marketers.

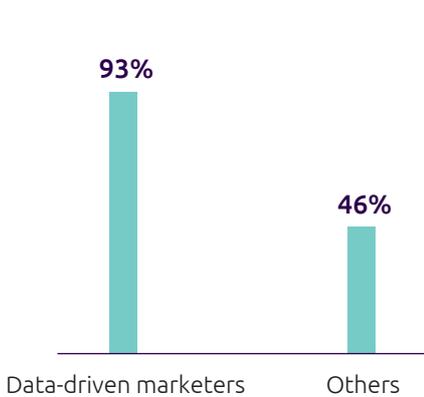
Cyrille Giraudat of RATPDev shares his organization is building a technical ecosystem to support real-time marketing. *“We have started to deploy real-time capabilities in our most mature networks and plan to extend it more broadly. Since we are a public-transport operator, real-time information is so crucial, especially during the COVID-19 pandemic. It was very important to have a solution in place through which we could keep our customers informed and up to date on things such as timetables, rules, and sanitary measures. These are changing very often and so it was critical to interact more often and more proactively with our customers”* he says.

Data-driven marketers are also more satisfied with their real-time marketing initiatives and are more likely to see greater value delivered:

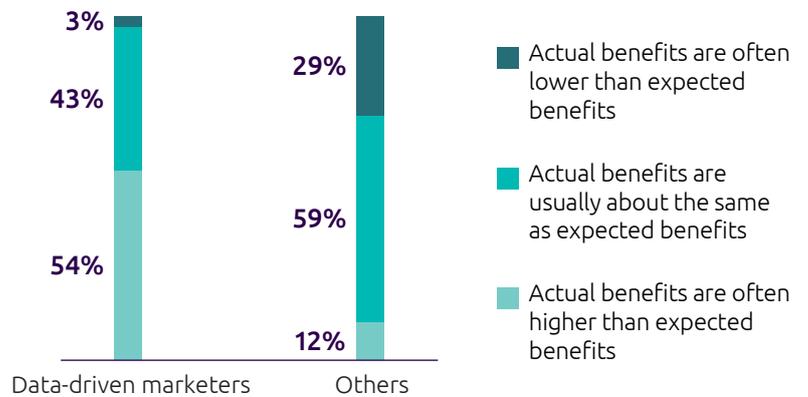
- 93% of data-driven marketers say they are highly satisfied (46% for others)
- 54% say the actual benefits exceed their expectations (12% for others).

Figure 10. 93% of data-driven marketers are highly satisfied with their real-time marketing initiatives and 54% say benefits exceed their expectations

Percentage of marketers who are highly satisfied with the effectiveness of real-time marketing



Percentage of marketers and whether their real-time marketing campaigns typically delivered the benefits expected



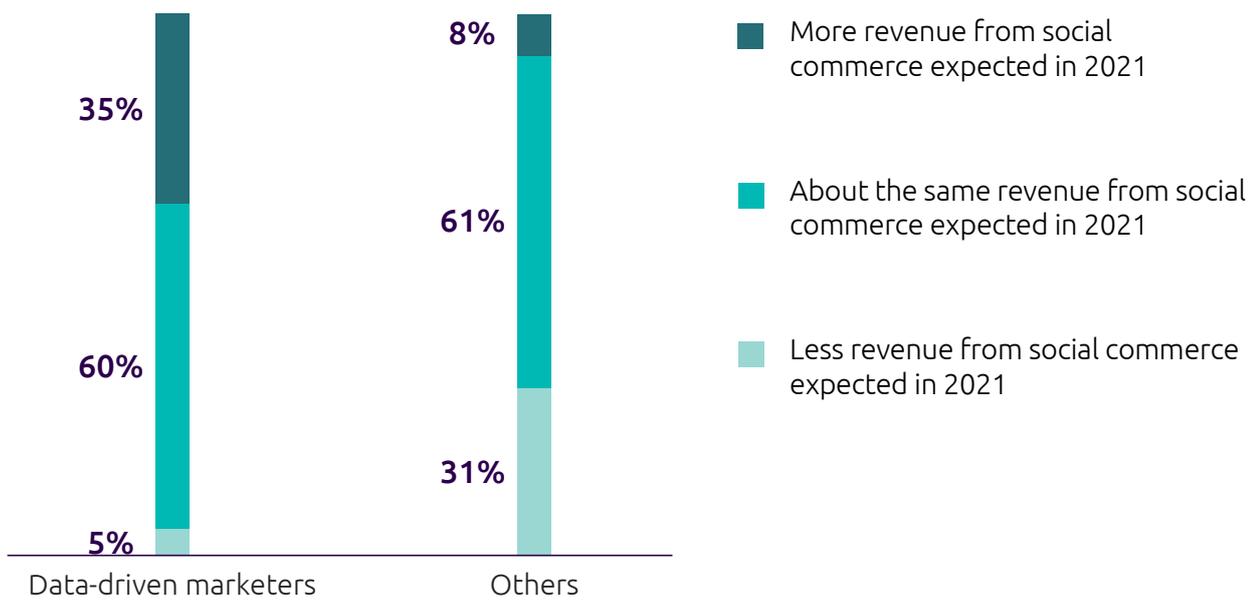
Source: Capgemini Research Institute, CMO survey, March–April 2021, N=179 data-driven marketers; N=1,421 other marketers.

Data-driven marketers also anticipate greater revenue from social commerce, the subset of ecommerce that involves selling products directly on social media platforms. This is an activity that demands real-time and social media capabilities. Our research shows that 35% of data-driven marketers expect more revenue from social commerce in 2021 compared to only 8% of others (see Figure 11). With the rise of ecommerce and social media, social-driven growth will

be increasingly important to reach customers. Accelerated by the COVID-19 pandemic, US retail social-commerce sales are expected to increase 34.8%, to \$36 billion, in 2021.¹² According to eMarketer, Instagram and Pinterest offer the most relevant social-commerce experience and apparel and accessories is the largest category for social commerce.¹³

Figure 11. 35% of data-driven marketers expect more revenue from social commerce in 2021 versus 8% of others

How has the recent economic shutdown (due to the Coronavirus spread) in several countries impacted your investment in AI deployments?



Source: Capgemini Research Institute, CMO survey, March–April 2021, N=179 data-driven marketers; N=1,421 other marketers.

16 PERCENTAGE POINTS

Increase in brand awareness and consideration among data-driven marketers for real-time campaigns.

Data-driven marketers realize better business outcomes from real-time marketing

When it comes to the overall impact of real-time marketing, data-driven marketers also report better performance against key metrics for real-time marketing campaigns:

- *Improved brand awareness/consideration:* 16-percentage point increase among data-driven marketers versus an 8-percentage point increase for other marketers
- *Improved customer satisfaction:* 16-percentage point increase among data-driven marketers versus 9-percentage point increase for other marketers
- *Increase in conversion rates (of prospects to customers):* 15-percentage point increase among data-driven marketers versus 6-percentage point increase for other marketers
- *Increase in customer retention:* 14-percentage point increase among data-driven marketers versus 6-percentage point increase for other marketers

Visa's Katarzyna Jezierska sees a direct impact on customer behavior resulting from their real-time marketing efforts: *"Our real-time activations support key business results, which include driving card-usage frequency and also increasing usage in new verticals. For example, encouraging users who only pay in the face-to-face environment to pay online, or driving users who use our cards only for domestic payments to also use them for payments outside of the country. The benefits of real-time marketing are the impact that we create on customer behavior, translating into specific business outcomes."*

DNB's Aina Lemoen Lunde outlines the importance of a pragmatic approach, where real-time marketing is scaled on a case-by-case basis: *"We are experimenting a lot and gaining experience in real-time marketing. Our marketing teams have the motivation and competence and we are trying to scale up, case by case. So, if we do have a successful case – within a certain customer journey or within loans, for instance – then we go straight ahead and just implement it."*

Data-driven marketing teams possess well-rounded talent

Data-driven marketers have a greater supply of data and technology talent:

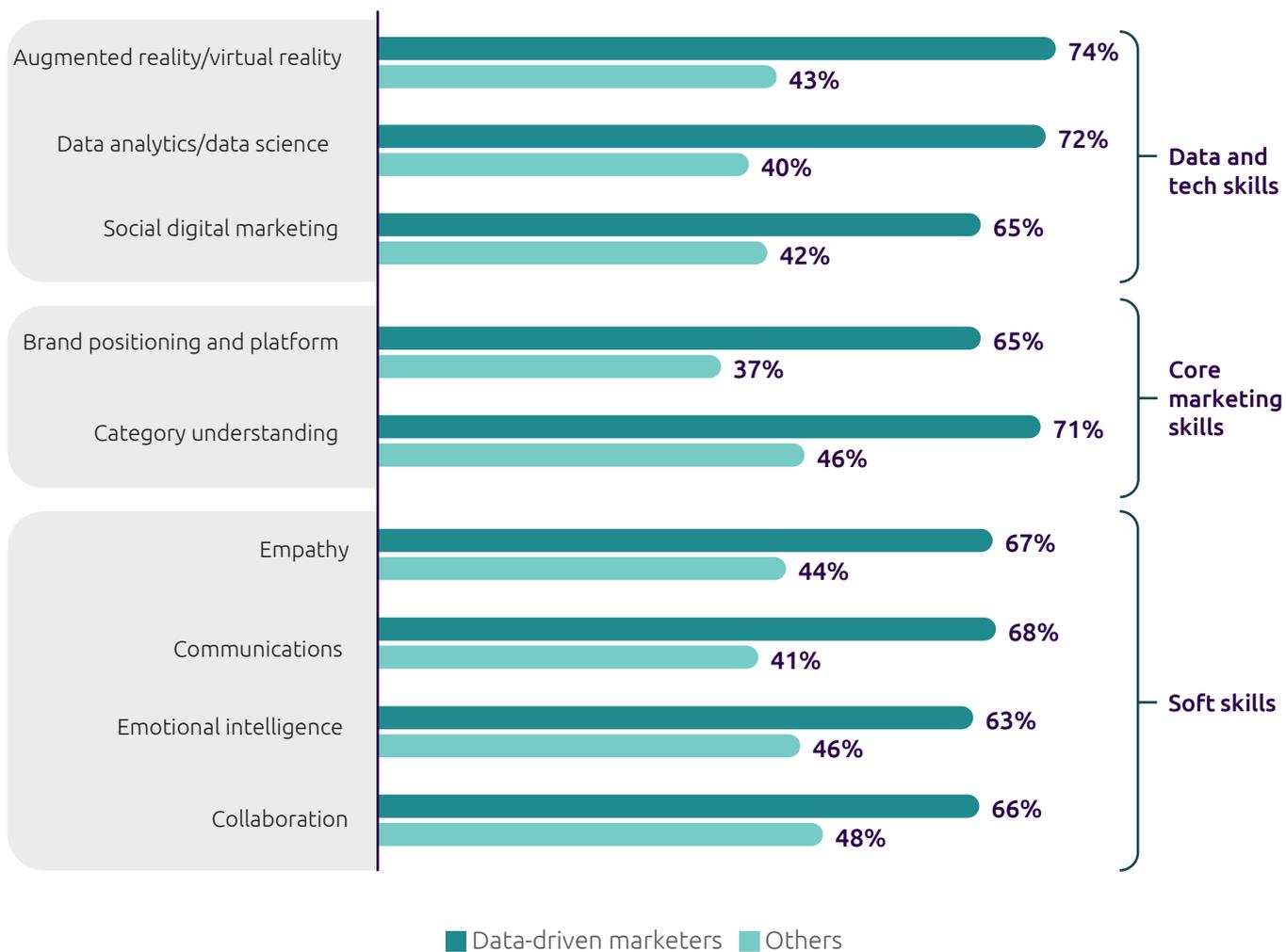
- 74% say they have an adequate supply of AR/VR skills (43% for others)
- 72% have the data analytics and data-science skills they need (40% of others) (see Figure 12).

Data-driven marketers also have a greater supply of core marketing skills, as well as soft qualities and skills such as empathy, collaboration, and emotional intelligence:

- 65% of high performers say their marketing teams have an adequate supply of talent skilled in understanding their brand positioning (37% of others)
- 63% have the talent they need in terms of emotional intelligence (i.e., the ability for people to recognize, understand, and perceive emotions effectively in everyday life) compared to 46% of others.

Figure 12. 72% of data-driven marketers have data analytics/data science and 71% have category understanding skills

Percentage of marketers that agree with the statement, "We have an adequate supply of this skill in my marketing organization"

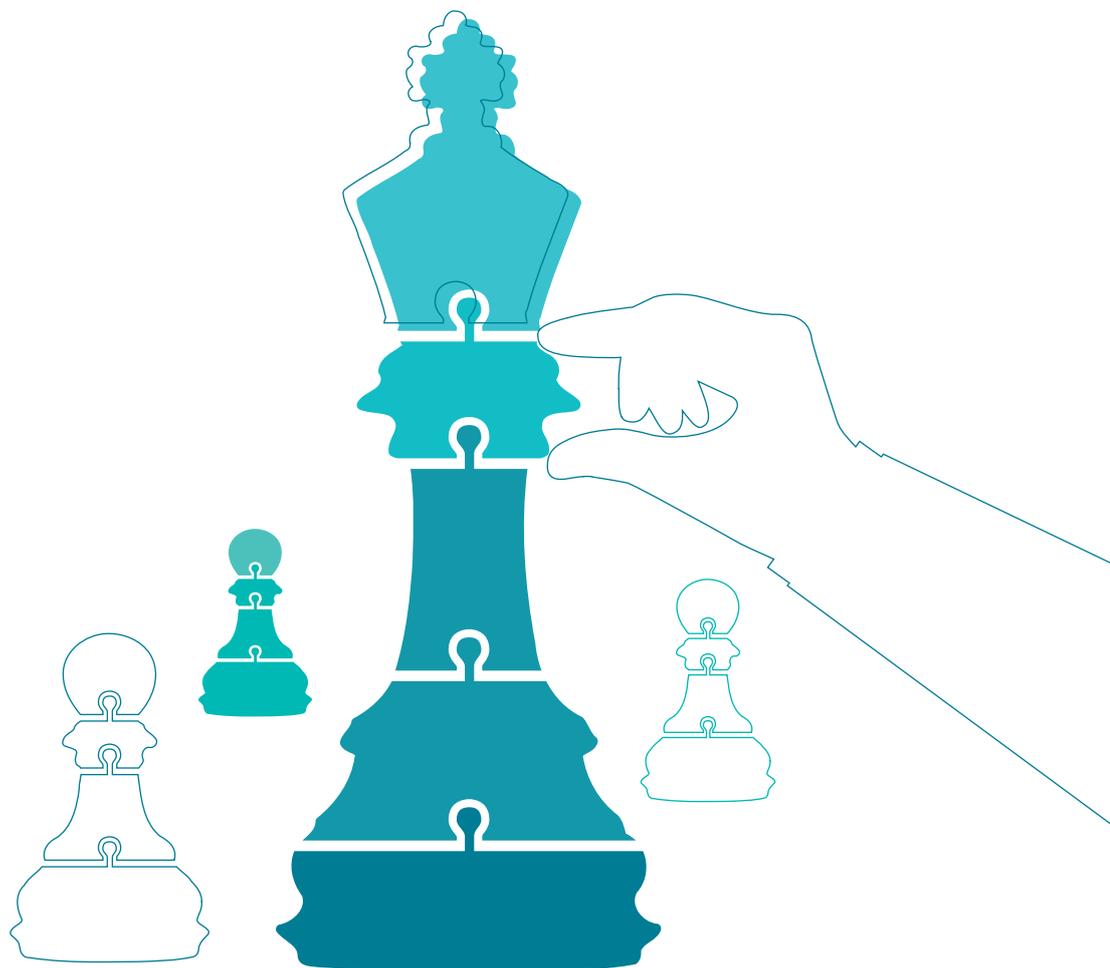


Source: Capgemini Research Institute, CMO survey, March–April 2021, N=179 data-driven marketers; N=1,421 other marketers.

Kristin O'Boyle, head of digital marketing for wealth management at US investment bank, Morgan Stanley, echoes the importance of finding a balance between analytics and qualitative insights: *"It's delightful to see the breadth and depth of analytic talent in the organization, and the firm's commitment to expanding it. While our financial advisors may know his or her clients best, there is tremendous value in aggregating all of that data together. We unlock that value by segmenting, analyzing, and modeling, then sharing back insights and intelligence with our financial advisors. We always want to be respectful of the fact that, in aggregate, the analytics are incredibly valuable but sometimes our financial advisor knows things that are not able to be modeled. Finding the right balance is very important."*

We also found that 66% of data-driven marketers say they have the collaboration skills they need (versus 48% of others). Clas Ohlson's Peder Apelgren points to the importance of collaboration: *"In digital sales and marketing, collaboration is king. If we don't collaborate, it just falls apart. One of the biggest hurdles to overcome is to break down silos and make people talk to one another. It's not a silver bullet, but it is one of the main factors."*

easyHotel's Rav Dhaliwal echoes the importance of collaboration: *"My team is marketing and digital, and we collaborate with our revenue management and commercial teams on many key areas. For example, identifying the appropriate pricing strategies and metrics and how we can drive the right amount of demand to the website or to the app. We also work with external agencies on user experience and our operations teams on the hotel experience. Consistent and positive brand experiences come from collaboration."*



Data-driven marketers foster creativity

Creativity and data are often considered opposites; creativity is seen as requiring the right brain, with a more artistic and emotional mindset, and data requiring the left brain, with a more analytical and methodological viewpoint. However, data – especially the insights obtained from first-party customer data – can be used to enhance the creativity of marketers. And creativity can enhance the ability to cope with new situations and be flexible. Our research found that data-driven marketers nurture creativity, which can take one of several forms:

- **Building quick responses for changing trends:** Data when integrated with creativity can help marketers to quickly respond to changing market trends with new campaigns and initiatives. Our research shows that 79% of data-driven marketers, by harnessing data, are able to be more agile in responding to customer and market needs as compared to 37% of others. For example, Spotify's in-house creative team used data and insights about consumer listening habits to quickly create personalized advertisement campaigns as suited to customers' changing music tastes.¹⁴
- **Syncing data and creativity in customer engagement:** Data-driven marketers, in their marketing initiatives, are likely to integrate creativity with different data-driven approaches such as:
 - **Understanding consumer intent across different channels.** Data and creativity together can help create unique marketing campaigns. For instance, Kellogg's created a new campaign for their social media channels which involved asking users to share views on the most unique bowl of corn flakes which gathered emotional responses from users, helping the team to gather feelings and intuitions about their product beyond the data.¹⁵
 - **Delivering new ideas for personalized content:** Data-driven marketers are likely to come up with new ideas on content development that resonate with customers. Netflix has developed data-led personas for their users, based on whether their interests are towards comedy, action, or other genres. The thumbnails that show recommendations are based upon the personas arrived for the user. For instance, if the user persona is "comedy," then the thumbnail is likely to depict laughing characters.¹⁶
 - **Driving hyper-targeting in customer engagement:** Along with creativity, data-driven marketers can also take targeting to new levels in the customer journey. Deutsche Bahn, the Germany-based railway implemented a marketing campaign "No need to fly," which encouraged customers who are interested in exotic international destinations, to book train tickets to look-alike destinations in their home country. By understanding the real-time location of their customers, the railway delivered a side-by-side comparison of both destinations – local and international, which resulted in higher click-through rates and a 24% increase in sales revenue.¹⁷
- **Pairing data and creative talent:** Our research also shows that data-driven marketers have a higher proportion of creative talent as compared to other marketers:
 - Sixty-one percent of data-driven marketers say they have an adequate supply of creativity skills in their organization, compared to 45% of other marketers
 - Sixty-four percent say they have an adequate supply of storytelling skills versus 46% of others.

The data opportunity in marketing

The range of opportunities to utilize data in marketing spans many dimensions, from brand-building and customer experience to loyalty and product development. Marketers can use data to inform decisions that impact the customer, the brand and, ultimately, the bottom line. Manuel Lorimier of Andros shares his views on the data priority in marketing: *"Digital marketing and, more broadly, data-led marketing, are the key to remaining competitive and growing profitably in today's environment."*

Figure 13 shows specific examples and use cases of how companies are using data in marketing to reach customers in new ways and drive better business decisions across a range of opportunities.

Figure 13. Data-driven marketing examples

Marketing activities	Use cases for data-driven decision making	Industry-wide examples
Brand strategy	<ul style="list-style-type: none"> Positioning the brand Identifying target segments Enhancing brand experiences 	<ul style="list-style-type: none"> Porsche AG, the Germany premium sports-car player, identifies customer segments to be targeted for brand positioning based upon two key customer datasets, one on users' descriptive elements, such as demographic, geographic, and psychographic profiles (e.g., wants and needs), and another on users' behavior elements, such as their responses to the brand, usage, and benefits. Porsche also used these data-driven customer insights for brand repositioning when they wanted to expand brand appeal to new audiences.
Campaign development	<ul style="list-style-type: none"> Delivering targeted and contextual campaigns Deciding the right media mix Data-driven content marketing Improving marketing campaigns 	<ul style="list-style-type: none"> General Electric prioritizes data-driven content marketing. Based upon datasets ranging from healthcare to energy consumption, the firm dedicates a part of its website entirely to data visualizations, highlighting their product offerings, projects and solutions. A winter apparel store improved its online advertisement campaigns based upon insights derived from sales data, including time of purchase, customer location, and weather data from different parts of the world. For example, they learned when customers typically start to plan their winter gear purchases, information which they then used in planning their campaigns.
Customer experience	<ul style="list-style-type: none"> Offering personalized products/ services Offering personalized promotions Customer retention Enhancing loyalty 	<ul style="list-style-type: none"> Nike, based upon consumer data collected from their website/apps (such as their preferred color, size, type of sneakers, price range, and design) customize their webpage/app to each individual customer to drive personalized engagement. Starbucks prioritizes data collection for customer retention. When consumers join their online channel, they can save their favorite order and receive access to rewards and offers. Likewise, the firm sends personalized promotions and offers to customers based upon the data taken from a variety of sources, including loyalty and in-store information.
eCommerce	<ul style="list-style-type: none"> Improving customer conversion in online channels Retargeting visitors based upon user behavior in websites/apps 	<ul style="list-style-type: none"> By monitoring customers' online journeys, the marketing team of pCloud, a file-security product firm, could understand that customers were leaving their purchase funnel in large numbers at a particular step, which helped them to optimize the path to purchase.
Marketing and product innovation	<ul style="list-style-type: none"> Retargeting visitors based upon user behavior in websites/apps 	<ul style="list-style-type: none"> Netflix decides when to release the next season of a particular show by analyzing a range of user data related to streaming, such as during which part of the day they watched the show, ratings, users' pausing and scrolling habits, along with social-media conversations about the show. Coca Cola, in a product launch for a new iced tea, targeted users based upon the pictures they had shared via social media. The firm identified users posting with tea glasses or jugs, or tea products from competitors, and targeted them for their new product ads, which yielded a clickthrough rate 3-4 times higher than for the benchmark tea ads.

Source: Capgemini Research Institute analysis.

HOW CAN CMOS TAKE FULL ADVANTAGE OF DATA-DRIVEN INSIGHTS?

Drawing on our research, as well as our experience in working with organizations in this space, we believe six focus areas are critical to CMOs' preparation for a data-driven marketing environment (see Figure 14):

Figure 14. Six areas of focus to take advantage of data and insights

Create a clear vision for the marketing strategy

- Ensure data-driven capabilities are at the core of marketing strategy
- Define the roadmap for transformation

Accelerate collaboration across the marketing ecosystem

- Collaborate with key functions - IT, sales and finance
- Collaborate with external partners

Ensure talent is equipped with a baseline of data and creative skills while allowing for specialists

- Recruit or upskill marketing talent
- Focus on developing an analytical mindset
- Upskill on digital and performance marketing
- Develop a learning culture
- Establish a center of excellence

Reimagine the customer journey with real-time engagement

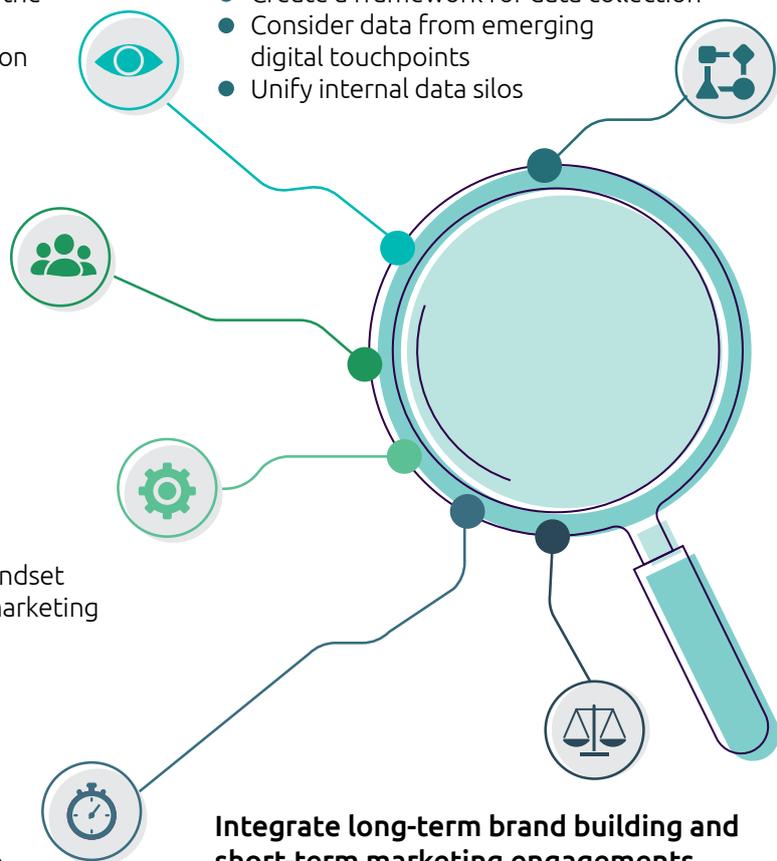
- Implement a customer-data platform
- Utilize customer-listening tools to understand intent
- Have a clear content-management strategy and solutions
- Use automation tools for delivery

Implement a framework-driven data-collection process

- Create a framework for data collection
- Consider data from emerging digital touchpoints
- Unify internal data silos

Integrate long-term brand building and short-term marketing engagements

- Build-in brand building with short-term marketing initiatives
- Allocate separate budgets for long-term and short-term marketing engagements



Source: Capgemini Research Institute analysis.

Create a clear vision for the marketing strategy

There is no one-size-fits-all approach to the marketing strategy; rather, marketers must deliver a personalized, relevant, and data-driven customer experience. While different approaches will work for different companies and brands, the fundamentals of a successful approach remain the same which includes the below:

Ensure data-driven capabilities are at the core of marketing strategy:

The marketing strategy needs to ensure data-driven capabilities are at its core. While each company's strategy and roadmap will be different, ultimately organizations must create a marketing ecosystem of strategy, people, process, data, and technology that is connected and working in harmony. In order to accomplish this goal, CMOs must build a responsive, interdisciplinary, empowered marketing organization able to execute at scale. Ensuring the team has the appropriate marketing technology to do this is also essential.

All of this requires CMOs to create a clear vision for the marketing function of how to seize the opportunities that arise through data and digital technologies. In parallel, the CMO must maintain focus on building the brand. As Kristin O'Boyle of Morgan Stanley says: *"For the CMO of the future, it comes down to marrying the use of intelligence and technology, with the art of brand-building and creative expression."* Antoine Dubois, senior vice president, marketing and global strategy at AccorHotels, a French hospitality group further emphasizes the importance of a clear vision: *"The chief marketing officer leads an orchestra, trying to synchronize and make sure that all the expertise works together to deliver a clear vision and a cohesive product."* He adds: *"So, keeping a strong*

vision for the brand helps to showcase to the team that they need to go faster than before, as real-time marketing and content gains importance. Previously, we used real-time marketing at certain touch points. Now, real-time marketing and content is critical throughout our entire customer experience including food and beverage, as well as the pre-stay, stay, and post-stay experience"

Define the roadmap for transformation:

If the marketing function is not already data-driven, the CMO must define the roadmap for this transformation across processes, operating model, governance and infrastructure. Key areas that CMOs should focus on to become data-driven in marketing are:

- Creating the marketing function's purpose, strategy, and roadmap to become data-driven
- Establishing the operating model for how it will collect, use, and share data across the organization and creating a data-governance plan
- Operationalizing data-driven marketing initiatives
- Nurturing a culture of data-driven innovation and marketing where the team is empowered to find appropriate, out-of-the-box solutions
- Identifying and ensuring the skill sets required for data-driven marketing are available
- Ensuring that everyone across the marketing ecosystem moves in a unified direction reflecting the strategy, brand promise, and purpose.²⁶



For the CMO of the future, it comes down to marrying the use of intelligence and technology, with the art of brand-building and creative expression."

Kristin O'Boyle

Head of digital marketing for wealth management at Morgan Stanley



Implement a framework-driven data-collection process

Data collection for marketing has come a long way from collecting social media impressions and browsing and purchase histories. Also, the way data is used in marketing has undergone a dramatic shift, from providing a view of what has happened in the past to a more forward-looking dynamic. CMOs should make the most of data collection by focusing on the following:

- **Create a framework for data collection: It is important to be clear on why data is needed and how it will be used before capturing data.** While data can come from different touchpoints, organizations should have a framework for data collection that provides them with clarity on the data that is needed, the purpose for which it is collected, how the data will be used and the frequency for collecting different datasets. This kind of framework helps organizations streamline the data-collection process and create a foundation for data activation, where data is further mined for insights. Netflix, for instance, focuses on certain defined parameters for data collection, including the date the content was watched; the device used for watching; portions that were watched again; and searches on its platform that are further used for data mining and deriving insights.²⁷ Likewise, CMOs should make the most of their data-collection process by integrating the aspects detailed below into their frameworks:
 - **Consider data from emerging digital touchpoints:** Marketers have access to multiple sources of brand-related data: chatbots, smart mirrors, AR/VR-based applications, interactive touchscreens, and in-store apps. Across all of these touchpoints, it is critical to ensure compliant handling of customer data and consent. The COVID-19 pandemic has also accelerated the adoption of virtual agents and chatbots for customer interactions. Jason Davey, head of experience technology at Ogilvy, an advertising, marketing, and public relations agency, says: *“As a result of lots of effort in integrating data across digital channels in 2020, we will see a further increase in the use of virtual agents by brands, assisting customers in a conversational shop-assistant-like interaction to traverse the complexities of modern life from changing phone plans to buying your next car.”*²⁸ However, not all organizations are

attempting to mine this seam of data: currently, 51% of marketers gather data from external touchpoints. This is a neglected source, given that these touchpoints can provide more insightful leading indicators on consumer preferences than can browsing history on websites or purchase history.

- **Unify internal data silos:** Likewise, organizations should also expand customer-data collection from different internal sources, such as customer relationship-management channels and sales functions. Currently, only 41% of marketers collect customer data from different internal touchpoints. Augmenting customer data from different sources is critical to arriving at a single customer view for further targeting and segmentation. Adisai Sirisinha, vice president of marketing of Nissan Motor Thailand, points to their data-collection efforts: *“As in many large firms, we have data sitting in many places. We are trying to connect and integrate them into one CRM system that allows us to have a single view of the customer. This will improve customer engagement and provide our customers with the best possible experience which in return provide us with improved business opportunity.”*

Further, CMOs should strive to have a complete picture of the data landscape across the organization – what are the different datasets and who is the owner, where are they stored – cloud or on premises, and their classification (e.g., internal, public, confidential) for improved clarity on data availability.

Ensure talent is equipped with a baseline of data and creative skills while allowing for specialists

Companies need to ensure employees have a baseline of fundamental skills within digital marketing, data, and creative while allowing for the development of specialist competencies. Traditional marketing talent tends to be more creative, with skills that are distinct from those of data specialists. Chief marketing and communications officer at Mastercard, Raja Rajamannar, explains this challenge as the combination of the left brain for data skills and the right brain for creative skills: *"Today, we need marketers who are like Leonardo da Vinci, who is a classic example of right-brain plus left-brain, both taken to a phenomenal level of competency and execution."*²⁹ While such aspirations may be a little overwhelming, CMOs can look to practical action points:

- **Recruit or upskill marketing talent:** Camilla Haveland, CMO at Storebrand, a Norway-based asset-management group, stresses the importance of data and insight-driven talent in marketing: *"Over the last two to three years, we have recruited profiles in our marketing department who are very tech-savvy. We are also working very closely in cross-functional teams with the technologists. If you work in a marketing department today, you need to love data and be very numbers- and insight-driven, rather than just faith- or gut instinct-driven."* However, while data-driven marketers are putting in significant effort in this area, there is still more to be done by most organizations. For instance, 90% of data-driven marketers upskill their talent on foundational data skills, such as analytics, statistics, visualization skills, and storytelling, compared to 56% of other organizations.
- **Focus on developing an analytical mindset:** Beyond the skills related to using data, marketers also need to develop a mindset that "questions" the outcomes from data that will help in identifying new approaches to meeting consumer expectations. AXA Insurance's CMO, Elise Bert Leduc, says: *"The key to successfully using data in marketing is to have analytics-oriented people who have the mindset to formulate sharp and relevant questions. It is important to have analytical talent who can challenge the data, test its validity, and be clear on the insights and outcomes. We are working to develop this mindset among our data scientists and analytical profiles."*



If you work in a marketing department today, you need to love data and be very numbers- and insight-driven, rather than just faith- or gut instinct-driven."

Camilla Haveland
Chief marketing officer at Storebrand

On the importance of mindset, Nissan Motor Thailand's Adisai Sirisinha adds, "A lot of marketers, especially ones that have been in the field for 15 or 20 years, are not comfortable with data. They need to develop the mindset to embrace data, understanding the need for certain types of data and how to use it to make decisions."

- **Upskill on digital and performance marketing:** While upskilling in data will be critical for marketers, it is also important for marketing talent to be upskilled in digital marketing and performance marketing – i.e., online marketing and advertising programs in which advertisers and marketing companies are paid when an action is completed such as a sales or click – given the increased importance of these fields to ecommerce and social commerce. Moreover, analytical skills and a data-driven mindset are essential to performing these two activities well.
- **Develop a learning culture:** Upskilling will be key to data-driven marketing and this requires that CMOs model a focus on learning and development. As Visa's Katarzyna Jezierska says *"The key for the CMO of the future will be learning agility and a willingness to continue evolving the vision for how marketing will contribute to the business."*
- **Establish a center of excellence:** Many companies are trying to find how to best access specialist skills which are in high demand and low on availability, for example data scientists. Partnering with data agencies to supply this talent can be one option that organizations consider. They can also establish a centralized center of excellence with key skills such as data science and creativity to help their marketing function. For example, as we shared earlier, Vanguard, the US-based financial-services company has an automation center of excellence with cross-functional experts to drive campaign automation.³⁰



Accelerate collaboration across the marketing ecosystem

Cross-functional collaboration is critical to becoming truly data-driven in marketing, especially when it comes to collecting first-party data from different functions. A key challenge to collaboration cited by interviewees is the fact that leaders across functions often speak a different “language” and their goals and objectives are sometimes in conflict. RATPDev’s Cyrille Giraudat emphasizes the importance of a common language to nurture collaboration:

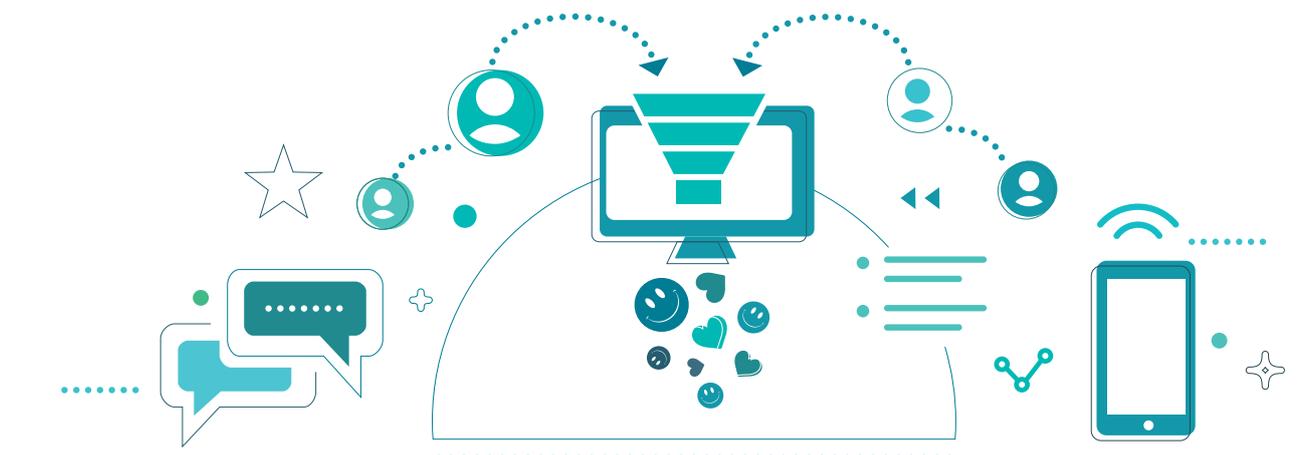
“When I joined three years ago, collaboration was not very well established. It was apparent even in the vocabulary used. For example, ‘it’s an IT project,’ ‘it’s a finance project,’ or ‘it’s a marketing project.’ To my mind, the most effective way to break down silos is a combination of having a clear methodology and a process and structure as to how cross-functional teams will work. These things are mandatory but, alone, they are not enough. You must have a successful project come out of it that will show what can be accomplished working hand-in-hand from the beginning.”

Some of the key functions where marketing should seek out close collaborations include:

- **Collaborate with IT:** CMOs are playing an increasingly significant role in data and technology. For around a third (33%), this is a direct responsibility, with 41% sharing this responsibility with others. Given that shared approaches are common, and that IT teams are critical to the implementation and maintenance of systems, a collaborative marketing-IT approach is essential, such as using agile methodologies and cross-functional teams. Gjensidige’s Janneke Tranas Marino subscribes to this collaboration model: *“We have a cross-functional team across marketing, business functions, and technology. For instance, our marketing team does not own the innovation process, but we have business developers from marketing, CRM, and customer experience involved in developing innovation services and new business models. The business*

developers are part of the early stage innovation workstreams to build, run, and fix the models and to provide a smooth handover to the agile development teams, so that we can easily take over the minimum viable products (MVPs), optimize [them], and decide on the next course of action.”

- **Collaborate with finance:** CMO responsibilities today include pricing new products and services – a direct responsibility at 51% of organizations in our research. It is essential that marketing and finance collaborate and share data around the pricing of products and services. Importantly, marketing functions should align with finance when arriving at mutually agreeable KPIs/metrics to ensure the marketing goals are ultimately aligned with business and there is clarity and consistency on how marketing performance will be measured.
- **Collaborate with sales:** Our research revealed that 27% of CMOs have direct responsibilities for business growth and another 41% share responsibility for it. Given the importance of digital sales, marketing and sales collaboration is essential. Sixty-nine percent of marketers say the sales function collaborates with their team when it comes to sharing data for marketing communications. Kamran Alemdar, CMO of Global Connect Group, a pan-Nordic, fiber-based connectivity and IT provider, says it is all about educating and proving the value when collaborating with other functions: *“In our organization, we have marketing heads in each country who work closely with the sales function. In many ways, our team educates the sales team in order to show them our value. For example, we can show them the extent of marketing- and sales-qualified leads, give them key data on their accounts, and how they are interacting with the brand, so they get a better understanding of the customer’s journey.”*



Further, given the variability in how organizations organize functions, close collaboration between sales, data, and the marketing teams is critical in order to drive a connected consumer journey across touch points leveraging real-time insights.

- **Collaborate with external partners:** Beyond internal functions, organizations should also have a well-defined collaboration model with the agencies they work with, to share best practices and utilize data and insights between them. At the outset, organizations should establish the marketing and advertising goals they want to achieve

with their agencies, assess their internal capabilities, gaps that exist, and areas where they need to work closely with their partners. An effective agency model should ideally be based upon three pillars: establishing the strategy and definition of the required capabilities, partnership management, and creating an ideal collaboration model.³¹

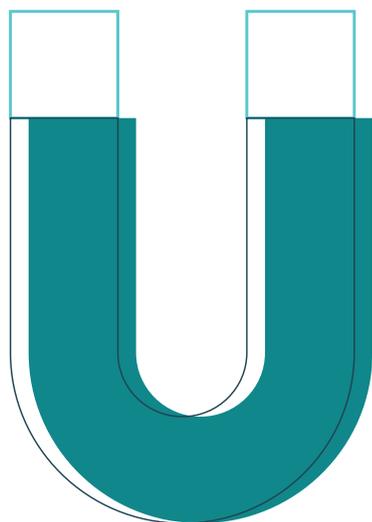


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Kamran Alemdar

Chief marketing officer at Global Connect Group





Reimagine the customer journey with real-time engagement

Real-time marketing engagement means delivering the appropriate and relevant message to customers at the right time and ensuring that messaging is on-brand. To begin with, marketers should define the moments along the customer journey where real time has the most impact. AXA Insurance's Elise Bert Leduc says: *"You don't need to invest in every single real-time marketing initiative along the customer journey, because you can use a lot of money or you can use a lot of data, but you need to understand what the key moments are in the customer journey, where you will need to be in a real-time mode with customers."* Real-time marketing engagement can be enabled with the following capabilities:

- **Implement a customer-data platform to provide a single, unified view of the customer:** A customer-data platform helps integrate customer data such as transaction, interaction, and behavior data from a wide variety of datasets, including data from multiple brands and partners and across internal functional silos like sales and customer service. This helps to achieve a single, unified view of consumers that can be further used for customer segmentation and determining cross-channel actions like personalization, email campaigns, or push notifications. Despite the importance of these platforms, only 45% of organizations currently have a customer-data platform to integrate and manage customer data from different sources. Storebrand's Camilla Haveland describes their platform journey: *"When we started our journey a couple years back, we wanted to create a CRM platform where we could be relevant, but also be consistent in our customer dialogue across channels. We looked into different platforms and figured out that they weren't really mature enough. So, we started building our own solution, where we also moved data into the cloud, did prediction modelling, and then made recommendations that we serviced through our customer center, digital channels, and marketing automation. This really saw results. Now we are taking this to the next level as new sources of data and new channels are made available. We are partnering with a tech vendor and are now in the midst of implementing an integrated customer engagement platform where we combine service design and technology to deliver relevant and engaging customer experiences."*
- **Utilize customer-listening tools to understand intent:** Capabilities such as social-media listening are needed to help organizations to understand consumer intent and behavior, collect first-party data about their customers, and spot trends. For example, PepsiCo's Gatorade brand has a command center to track social-media conversations and visualize the information. The firm tracks every metric and comment related to the brand – and mentioning their competitor brands as well – in social-media

platforms.³² Our research shows, however, that only 45% of organizations have this sort of social-listening capability, despite the availability of off-the-shelf social media tools that combine social-media listening, tracking, and analytics.

- **Have a clear content-management strategy and solutions:** A clear content-management strategy, aligned with the brand purpose, has become more important with the onset of the pandemic. Over half (54%) agreed with the statement: "The pandemic has emphasized the importance of content-driven marketing (i.e., providing targeted, relevant content) to creating consumer trust online." Since the use of digital channels has surged during the pandemic, it is critical to ensure that the content received in the channel is trusted by the consumers. This means that content-management platforms for organizing and orchestrating content will be important; however, only 47% of organizations in our research have a content-management platform. Gjensidige's Janneke Tranas Marino speaks about content optimization with their content hub: *"We have a content hub to produce content suited to each channel around strategic and tactical branding initiatives. The content hub also ensures that we reuse content to derive the most value from it, so that we don't have to produce new content for every campaign."*
- **Use automation tools for delivery:** Real-time marketing automation tools help marketers to deliver personalized marketing messages at the right time to consumers. It can allow marketers to deliver the "next-best course of action," i.e., consider multiple different actions that could be taken for a specific customer and then decide on the most appropriate, based upon their real-time data insights. HelloFresh, a Germany-based meal-kit service provider, employs email marketing to prospects based upon users' activity on their website, such as the extent to which they check their offerings and meal options. Based upon these behavioral triggers, the company uses marketing automation tools to activate email marketing at the right time for those prospects.³³ Michael Roberts, CMO, retail at Vanguard, a US-based financial-services company, explains how they drive marketing automation: *"We have a real-time marketing hub where we feed first-party and third-party data to drive automated campaigns across channels. We have goals for the number of automated campaigns and, while we were automating 1% of campaigns in 2019, this increased to 10% in 2020 and now we are over 30%. This is enabled by a personalization and automation center of excellence comprised of cross-functional experts."*

Integrate long-term brand-building and short-term marketing engagements

In the journey to delivering short-term marketing engagements (e.g., real-time marketing with immediate outcomes such as sales leads), marketers should not lose sight of long-term brand-building initiatives. Long-term initiatives tend to have longer lead times for outcomes and harder-to-measure metrics such as brand reach or awareness. However, long-term brand building is vital for creating a clear mental image and top-of-mind awareness for the brand. Some of the ways in which organizations can integrate long-term brand building and short-term engagements include:

- **Build-in brand-building with short-term marketing initiatives:** Organizations should bundle brand-building into their short-term, tactical marketing initiatives.
 - Storebrand’s Camilla Haveland talks about integrating brand-building into every tactical action: *“A business unit will always prioritize tactical marketing because that is what will bring short-term revenue. But, as a marketing department, our role is to see how we can capitalize on the investment by making sure that there is a natural link between strategy and tactical marketing. We must ensure the brand is there in everything we do – be it the communication departments liaising with the media or the HR department taking care of employer branding.”*
 - Boots UK’s Peter Markey says the integration starts with delivering the tactical initiatives outcomes. *“At Boots, we have got an eye on both those things. How are we doing today, where’s the brand going next, who our customers are and who are we appealing to. There’s a tension there. If you are being seen to be delivering day-to-day results, it helps with those harder conversations about longer-term investment for the brand and planning for the future. But, if you’re struggling day to day, those conversations are a lot harder,”* he says.

We found 86% of data-driven marketers say that real-time marketing has allowed their organization to support long-term brand-building (this drops to 51% for other organizations).

- **Allocate separate budgets for long-term and short-term marketing engagements:** It is important for marketers to have separate budgets to ensure adequate funding for both long-term brand-building initiatives and short-term ones that are likely to produce immediate outcomes like sales leads. For example, Fidelity Investments’ David Dintenfass says: *“We’ve structured around the challenge of balancing long and short term. We have a different budget for delivering the current business year’s scorecard, such as revenue, and a separate R&D budget where we do long-term brand-building for new ideas or initiatives that are unproven or harder to measure. For example, using Redditt or TikTok to reach new customers. We will test to see what works and then scale.”* Global Connect Group, a fiber-based connectivity and IT provider that works across Northern Europe, has a culture of tying up all their marketing activities to either brand-building or tactical sales leads. And they have measurable goals against each of them. This helps to maintain the balance between long-term and short-term activities, understand the extent of budget allocation for these activities, measure their effectiveness, and how they impact the business.³⁴

CONCLUSION

The explosion of data, driven by the acceleration of digitalization and the rise of ecommerce, is enabling marketing to achieve its potential as a growth driver. Marketing has never been more integral to business, as the CMO role has broadened and become more holistic, with many now responsible for customer experience and growth strategy. Given the need for marketers to truly understand how customers interact with brands and companies and know when and where to engage with them, real-time data will be a critical enabler for CMOs to deliver their broadened remit. Our research reveals, however, that organizations are indeed struggling to be data-driven in marketing owing to capability, talent, and access challenges. For those organizations that are successful, they are reaping benefits ranging from more effective decision-making, better business outcomes, and the ability to perform real-time marketing that consumers increasingly expect. It is critical that today's marketing teams be data-led, so they can drive sustainable growth.

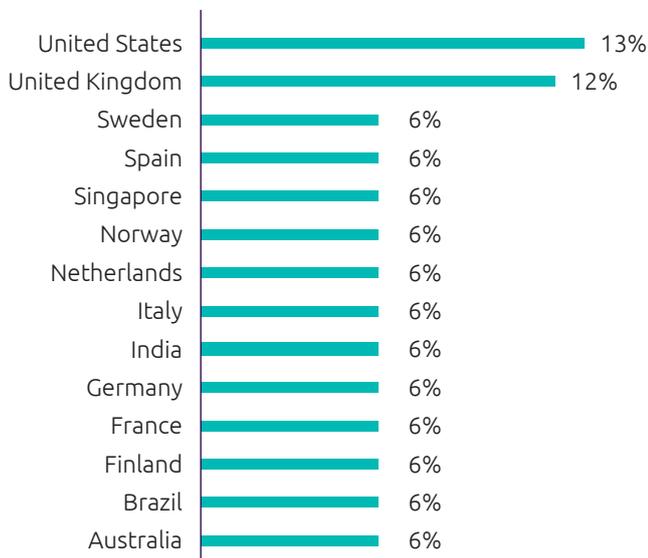


RESEARCH METHODOLOGY

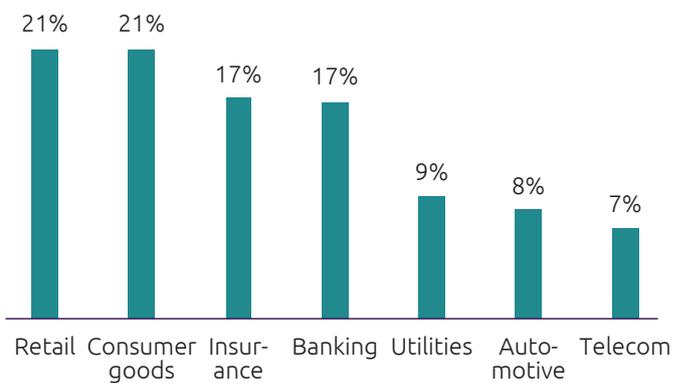
We surveyed 1,600 marketing executives around the world with a business-to-consumer (B2C) focus. The survey was conducted between March and April 2021. The majority of organizations included (93%) reported at least \$1 billion in

revenue for the most recent financial year. We also conducted in-depth interviews with 25 chief marketing officers and other marketing executives across a range of sectors and countries.

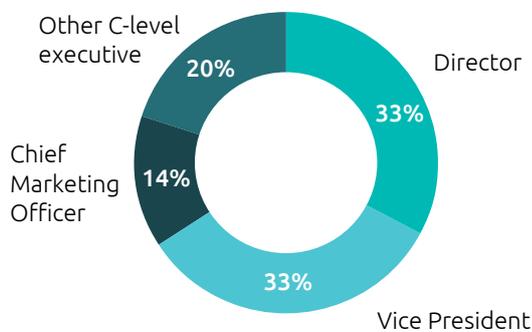
% of marketers by country of residence



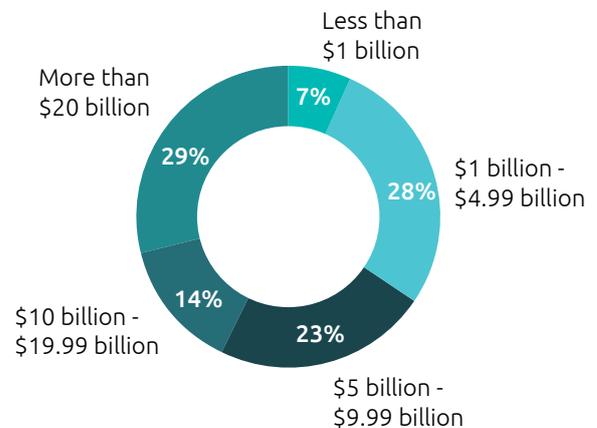
% of marketers by sector



% of marketers by designation



% of organizations by revenue



Source: Capgemini Research Institute, CMO survey, March-April 2021, N=1,600 marketers.

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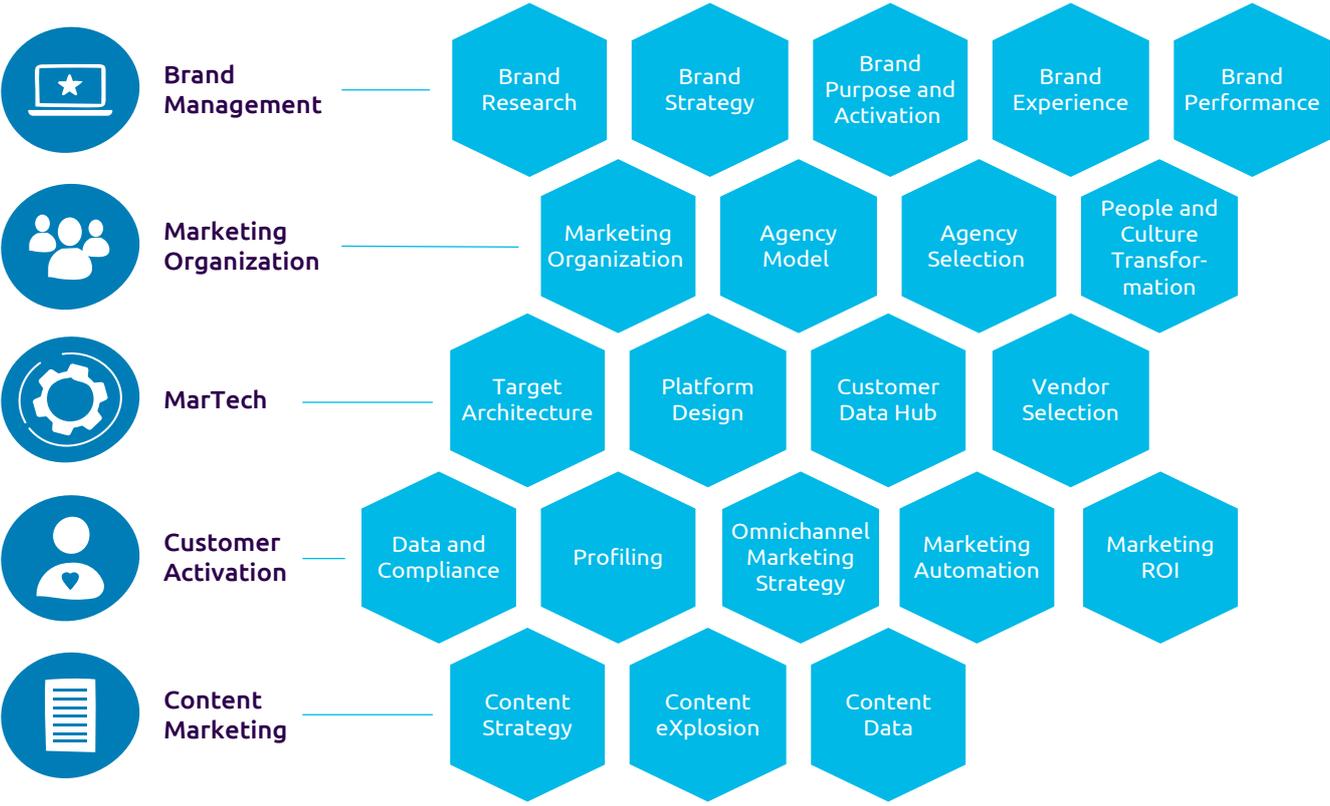
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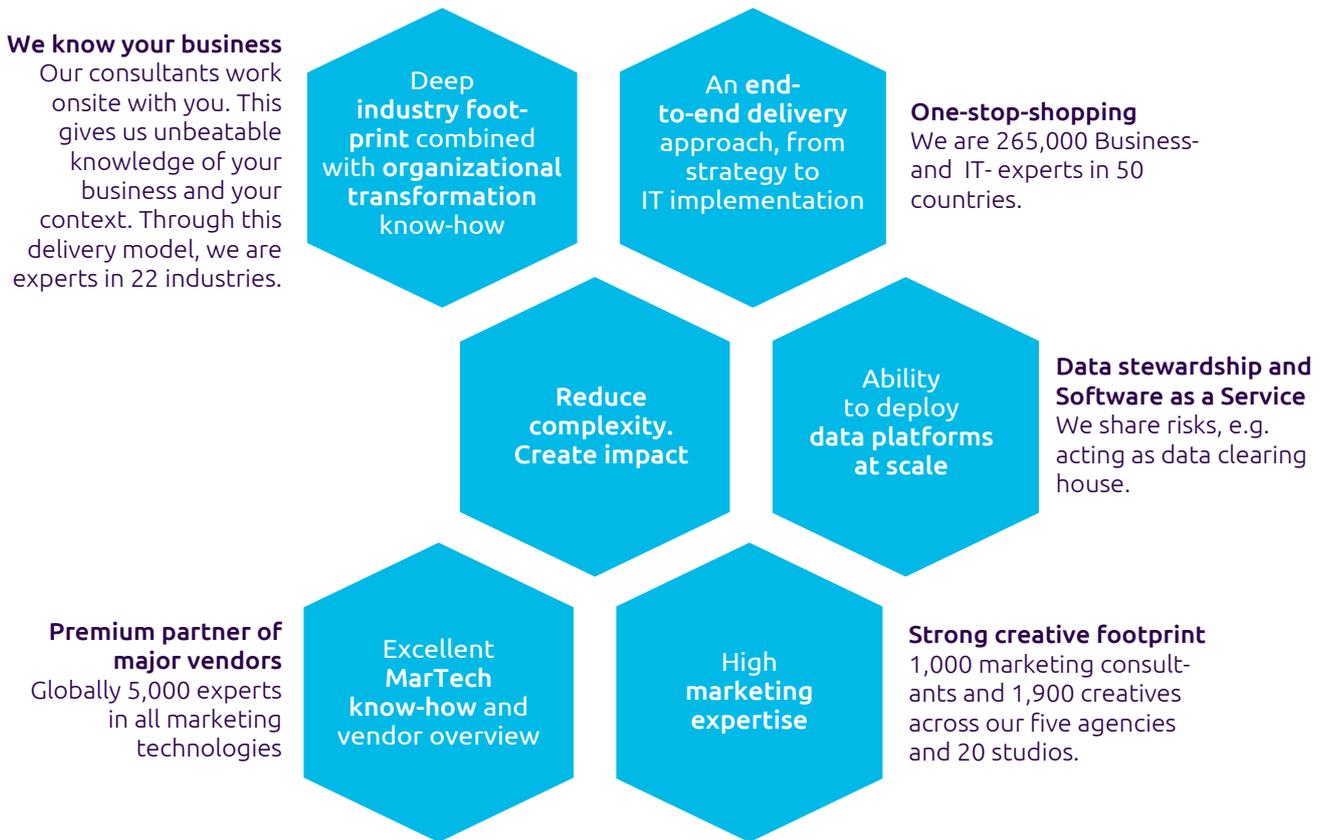


Understanding marketing from an ecosystem perspective reduces complexity and supports the CMO in managing these areas:

- Data-driven: Creation of benefits beyond brand values
- Responsive: Collaboration between departments
- At scale: Services rely on business and IT interplay
- Personalized: Unified and trusted data

Our value proposition

Our value proposition lies in creating marketing impact by de-complexifying the challenges.



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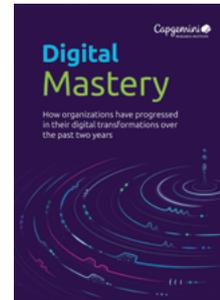
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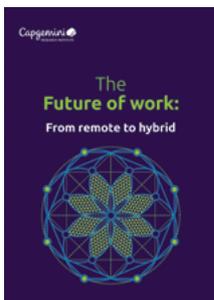
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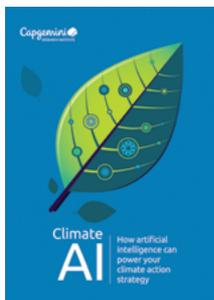
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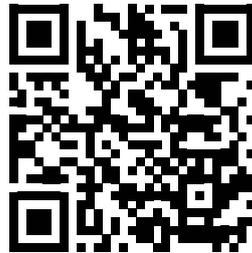
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