

THE VOICE OF THE CMO

EXPLORING ATTITUDES TOWARDS
TODAY'S MARKETING LANDSCAPE

●	INTRODUCTION	3
●	METHODOLOGY	4
●	CMO PRIORITIES: A SUMMARY	5
●	KEEPING CUSTOMERS HAPPY	6
	Staving Off Brand Backlash	7
	The Impact Of Brand Backlash	8
	B2B V B2C - Key Differences	9
●	TECH TRENDS: THE RISE OF AI	10
	Handle With Care	11
	AI's Numerous Advantages	12
	Creative Champion or Curse?	13
	B2B V B2C - Key Differences	13
●	WHAT'S YOUR SKILLS STRATEGY?	14
	Finding Talent Is No Mean Feat	15
	B2B V B2C - Key Differences	16
●	MEASURING MARKETING'S IMPACT	17
	Providing Campaign Success	18
	B2B V B2C - Key Differences	19
●	INNOVATORS VS. LATE ADOPTERS	20
●	KEY TAKEAWAYS	21

INTRODUCTION

THE MARKETING INDUSTRY IS EVOLVING AT A FASTER PACE THAN EVER BEFORE

CMOs are dealing with an explosion of digital channels and a widening range of disciplines requiring new skill-sets - all driven by rapidly emerging technology, not least Artificial Intelligence (AI).

As marketing leaders try to navigate this shifting landscape, helping the brands they champion to achieve continued success, we recognised that it's a great time to take a temperature check of their challenges, concerns and changing attitudes.

This report puts the views of 500 CMOs from organisations of all shapes and sizes, based across the UK, under the microscope. You'll discover that - even amid a rush to embed new technology that promises to revolutionise brand-building and marketing campaigns - the customer remains king. Understanding and responding to the values of target markets is a priority, especially if businesses are to avoid the 'brand backlash' that threatens reputations and bottom lines.

CMOs also reveal they are hands-on with AI, although they still have concerns over the long-term effects on important aspects of their industry such as creativity and employees' future roles.

Our study also suggests that while they have a clear idea of the talent required to manage a tech-driven future, CMOs are struggling to find the skills they need.

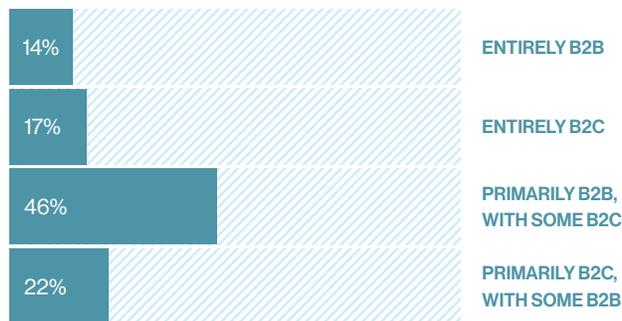
Another key challenge is putting in place the right measurement systems to prove the value of marketing. Only when the level of campaign effectiveness and ROI is clear can CMOs expect to win full buy-in for their strategy from senior stakeholders at their business. Crucially, CMOs who use market research techniques to measure their output see a significant surge in boardroom backing for their plans.

We trust that the insights we uncover in this report serve as a useful way of benchmarking your performance, as well as showing that when it comes to even the biggest challenges you're facing, you are certainly not alone.

METHODOLOGY

CENSUSWIDE SURVEYED 500 CMOS AGED 25+ BETWEEN 25.06.2024 – 08.07.2024 (SAMPLE BREAKDOWN)

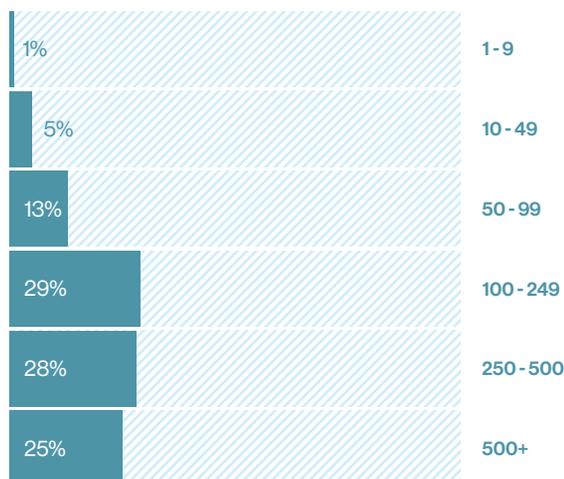
Marketing Focus



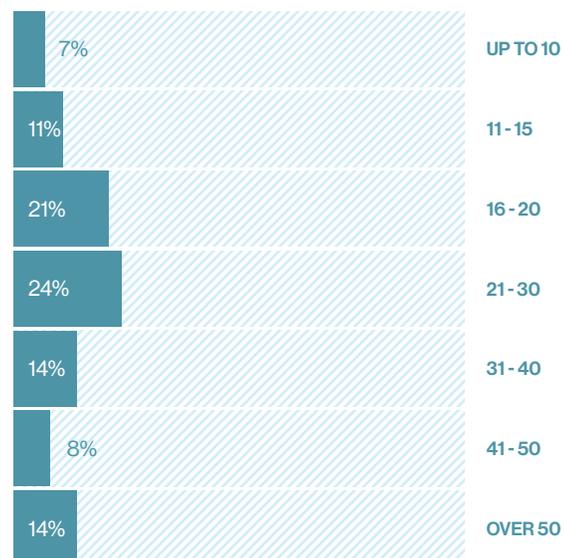
Company Turnover



Company Size



Marketing Department Size



Censuswide abides by and employs members of the Market Research Society, follows the MRS code of conduct and ESOMAR principles, and is a member of the British Polling Council.

CMO PRIORITIES: A SUMMARY

55%

of CMOs seek to understand customer beliefs and behaviour **using qualitative market research**, and 51% use quantitative research.

43%

say AI makes their marketing process more creative, compared with 21% who find it a hindrance.

20%

worry about campaigns resulting in 'brand backlash' all of the time, with an additional 41% saying they are anxious most of the time.

40%

name creativity and innovation as the skills they are seeking to add to their team, with 39% citing skills for using AI.

47%

have had to deal with brand backlash in the past, and 59% admit to not dealing with the problem.

However, 38% of CMOs say finding the right talent for creativity and innovation is either difficult or impossible.

100%

of organisations have adopted some form of new or emerging tech; with 73% of CMOs already using generative AI tools.

43%

claim the stakeholders in their organisation fully understand and are bought into marketing, while 12% state there is no understanding and it's hard to achieve buy-in.

62%

of CMOs say they embrace AI with open arms, while 32% are doing so with caution.

39%

of CMOs say they are having to **manage more activity with smaller budgets**.

97%

have specific concerns about using AI, chiefly security/data issues (50%) and its potential to provide unoriginal content (37%).

97%

currently measure the effectiveness of their marketing activity. Most (46%) measure the visibility of sales data.

However, CMOs adopting AI cite better results since using it. These include improved analysis (53%) and better content production (52%).

46%

who use market research as a measurement tool also say their stakeholders are fully invested in marketing; while 38% of CMOs who don't use such tools have the full backing of the wider business.

KEEPING CUSTOMERS HAPPY

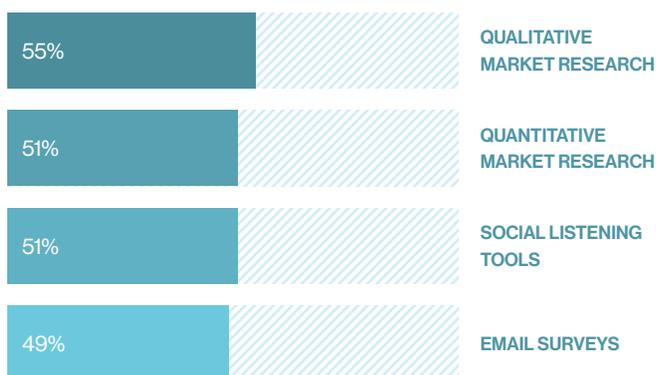
CONSUMERS HAVE HIGH EXPECTATIONS OF BRANDS.

Nearly half (46%) of them believe it's important to share the values and missions of the brands they buy. But the same proportion (46%) of consumers worry that brands' values and missions are false¹.

Shrugging this off wouldn't be wise: around 1 in 3 (34%) consumers avoid buying brands that don't reflect their values. As a snapshot of consumer trust and expectations of brands, all of these results prove the importance of listening to - and responding to - your target market.

But how are CMOs capturing the beliefs and behaviours of their customers?

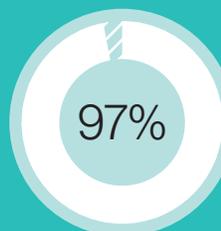
They're listening in a variety of ways, using:



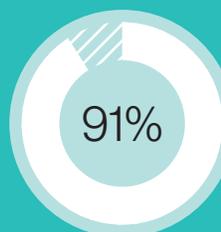
In general, CMOs are pretty satisfied that the methods mentioned provide a clear picture of customer expectations.



95% say both quantitative and qualitative research is effective



97% rate social listening as an effective method



91% agree email surveys are effective (though 9% disagree)

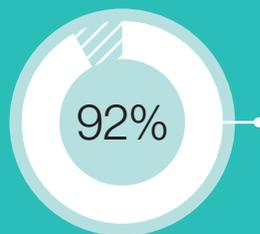
¹<https://censuswide.com/censuswide-projects/censuswide-brand-value-research/>

STAVING OFF BRAND BACKLASH

In a world where social media commentary can influence mass consumer sentiment in an instant, CMOs need to do more than listen. They must hear the concerns of their target market and respond in a rapid but relatable way.

Brands as big as Balenciaga and Pepsi have found, to their cost, that misunderstanding - or ignoring - consumer attitudes can cause serious problems; from suffering social media ridicule, to being fully cancelled and shedding sales as a result.

CMOs are acutely aware of brand backlash when planning campaigns. In fact, over 9 in 10 (92%)² say they feel concerned about brand backlash to some extent when planning marketing activities, with 1 in 5 (20%) stating it's always on their mind, just over 2 in 5 (41%) saying they worry about this most of the time and just over 3 in 10 (31%) saying they are concerned some of the time. On the other hand, just 8% of CMOs never feel concerned about this issue.



92% of CMOs feel concerned about brand backlash when planning marketing activities²

In fact, many CMOs claim the threat of brand backlash harms creativity. A total of 39% of respondents who worry about the issue sometimes, most, or all of the time believe it has a negative impact on creative marketing initiatives.

² Combines 'All the time/every campaign', 'Most of the time/most campaigns' and 'Some of the time/few campaigns' in response to the question: 'In general, how often, if ever, do you feel concerned about brand backlash when planning marketing activities?'

THE IMPACT OF BRAND BACKLASH

CMOs are understandably keen to avoid brand backlash - but it's a big problem. Of those surveyed, almost half (47%) have had to handle such a crisis, while more than 1 in 5 (21%) have done so multiple times.

Respondents who've been hit by brand backlash say they responded in a number of ways. Here's a snapshot of their strategies:

Communication

"Actively responded in real-time"
"Admitted to and promised to fix mistakes"
"Distanced ourselves from brand ambassador"

Progress

"Kept promise to improve policies, products and services"
"Put in place strategies to prevent a repeat"
"Responded quickly and developed a brand reshaping plan"

PR and Marketing

"Advertised positive brand aspects"
"Made a statement, donated to charity"
"Listened to customers and rebranded"

The last strategy loops back to where we came in: listening to and understanding customers, as a way to attract and retain them, is crucial - especially in the age of cancel culture. Only a small majority (59%) of respondents say they didn't handle the crisis at their brand when it happened, showing CMOs need to do more to recognise and remedy such situations.

Consumers are more conscious than ever of inconsistent or inauthentic brand values and campaigns. Knowing how to use technology, data and insights to reflect customer values, building trust and mutual respect, is vital.

KEEPING CUSTOMERS HAPPY

B2B V B2C - KEY DIFFERENCES

Increasing brand awareness is the top priority for CMOs in purely **B2B** businesses (44%) and **B2C-only** organisations (43%).

B2C-only respondents are more likely (46%) than their **B2B-only** counterparts (34%) to say they have suffered a brand backlash crisis.

2 in 3 (67%) CMOs at **B2C-only** organisations worry about brand backlash most or all of the time, but this drops to 52% of CMOs in **B2B-only** businesses³.

B2B marketing-only organisations are most likely (62%) to use social listening tools to understand what customers want, with email surveys (44%) their least preferred method.

At purely **B2C** businesses 59% use qualitative market research but a minority (44%) rely on social listening tools.

³ Combines 'All the time/every campaign' and 'Most of the time/most campaigns' in response to the question: 'In general, how often, if ever, do you feel concerned about brand backlash when planning marketing activities?'

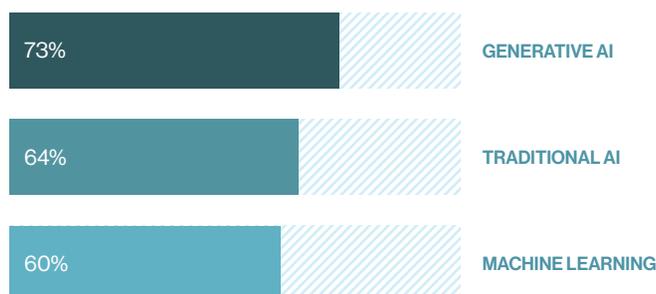
TECH TRENDS: THE RISE OF AI

It's fair to say parts of the marketing industry were caught out by the sudden burst of AI-driven creativity tools in spring 2023. Even some tech experts raised their eyebrows - not least 'Godfather of AI' Geoffrey Hinton, who was so concerned about the power of the new tools that he quit his role at Google.

Nearly 18 months on, anxiety over sweeping job losses caused by technology replacing creative roles has settled down to a more considered conversation about the 'ABC' of marketing AI: adoption, benefits and consequences.

Here's a summary of CMOs' current attitudes towards emerging tech; keeping pace with it is a top priority for almost 3 in 10 (29%) of those we surveyed.

Overall, 100% of respondents' organisations have already adopted some form of new or emerging technology. This includes:



100%

of CMOs organisations have already adopted one or more types of emerging technology⁴

When it comes to those who have yet to implement various types of emerging tech, on average⁵ they plan to adopt:



Virtual Reality
in seven months' time



Generative AI
in seven months' time



Machine Learning
in seven months' time



Traditional AI
in seven months' time



Digital Assets
in seven months' time

⁴ Reverse of 'Have not adopted any new/or emerging technology', in response to the question: 'What new or emerging technology has your organisation already adopted? (Tick all that apply)'

⁵ Mean: Months excluding 'unsure yet' and 'Never', in response to the question: 'Q4. You said you have not adopted the following technology, when, if ever, do you plan to adopt it?'

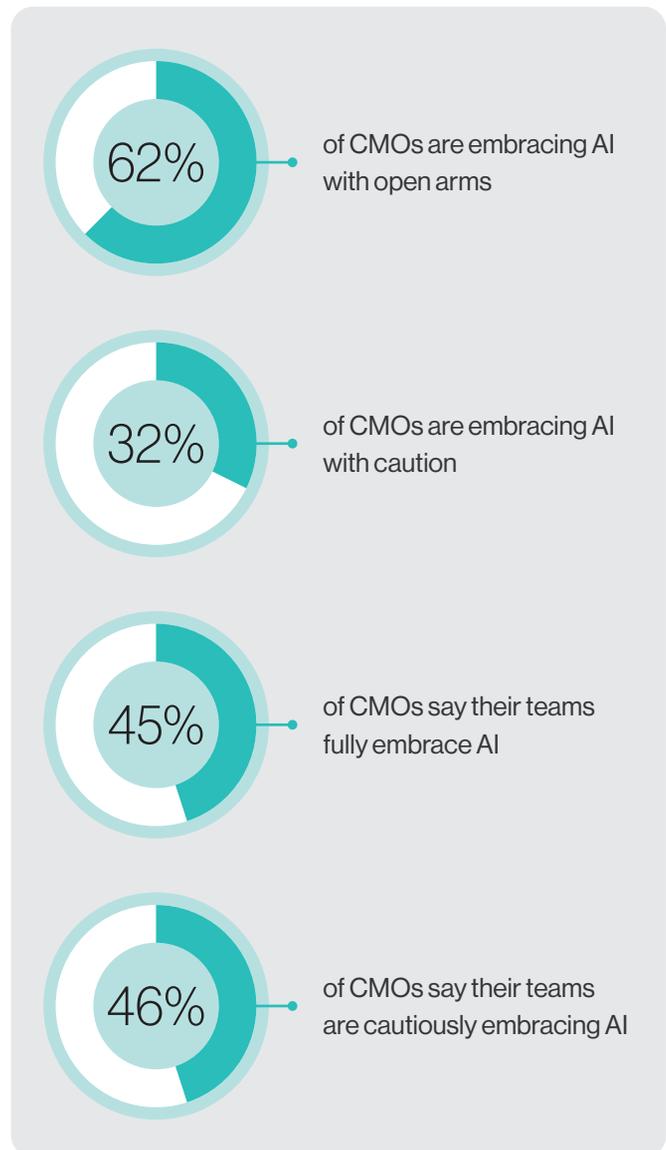
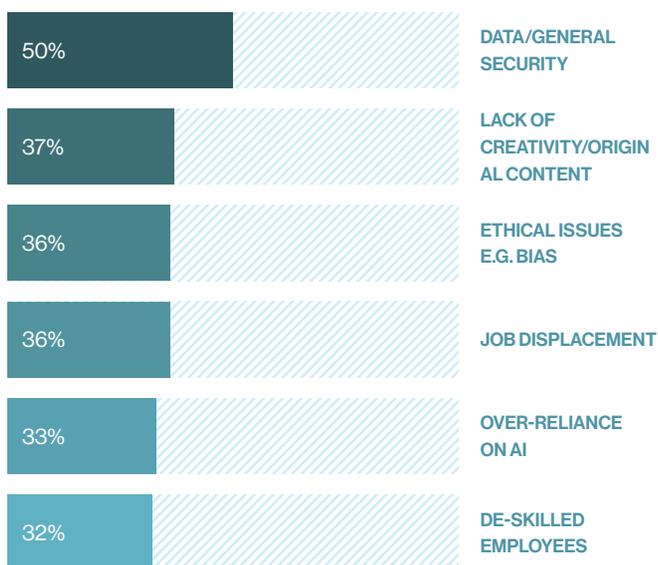
HANDLE WITH CARE

There's an almost universal understanding that AI can't be ignored - but many businesses are still wary of its impact. While 99% of CMOs are embracing AI⁶, and 62% are doing so with open arms, 32% are cautious about adopting the technology.

Employees are more sceptical: an almost equal share of them embrace AI fully (45%) and cautiously (46%) accept it. This is reflected in the 31% of CMOs who say hesitation to use AI among their colleagues is a challenge they face when adopting AI.

And, despite their general enthusiasm towards AI marketing tools, CMOs continue to harbour a range of concerns about the technology - including how it will affect team members. **In fact, 97% claim they have one or more concerns specific to AI⁷:**

CMO concerns around AI



⁶ 'Embracing it with open arms', 'Embracing it with caution' and 'Embracing it reluctantly' responses combined, in response to the question: 'How do you feel about AI and how does your team feel about it?'

⁷ Reverse of 'No concerns', in response to question: 'What concerns do you have specific to AI, if any? (Tick all that apply)' You said you have not adopted the following technology, when, if ever, do you plan to adopt it?'

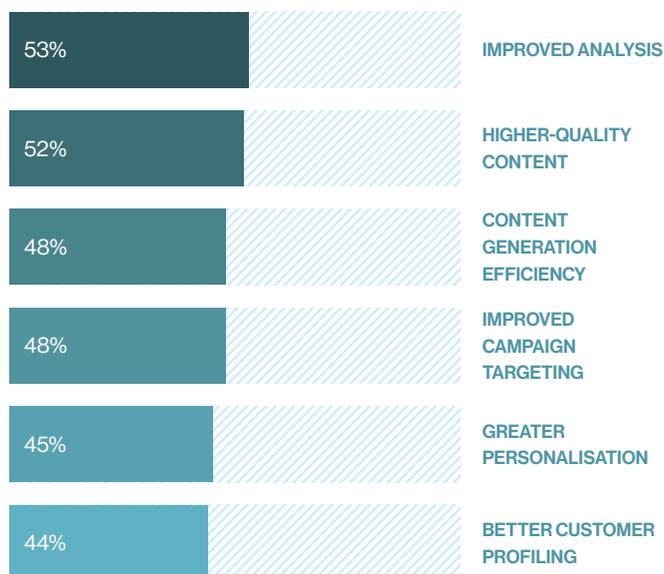
AI'S NUMEROUS ADVANTAGES

Potential pitfalls are constant considerations for many CMOs. But they've also been quick to grasp AI's value for marketing and, vitally, for consumers.

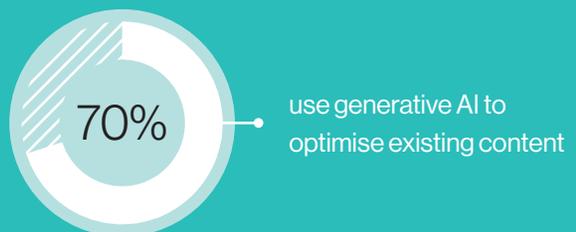
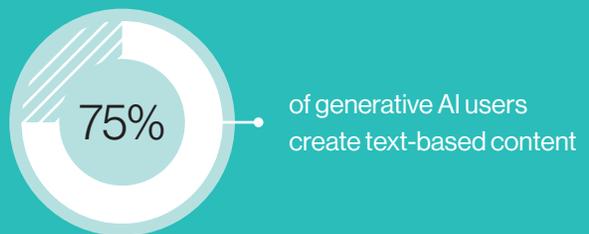
CMOs told us their top challenges are improving customer experience (29%), and attracting and retaining customers (28%). Those already using AI tools in their marketing strategies are chipping away at these challenges.

Almost half (48%) claim they've been able to improve targeting, and almost as many (45%) are achieving better personalisation. These are both crucial factors in boosting customer experience and loyalty.

Better marketing outcomes since adopting AI include:



CMOs are busy experimenting with AI in a number of ways.



CREATIVE CHAMPION OR CURSE?

In spite of wide-ranging adoption, and a number of uses and perceived benefits, a majority of CMOs are still to be totally convinced about AI-driven creativity.

While more than 2 in 5 (43%) believe AI fully or mostly enables a more creative approach, almost a quarter (23%) in total⁸ claim AI is a hindrance, not relevant for creativity or has no impact on it. The other 34% are on the fence - stating AI has something to offer creativity but could also restrict it.

It's clear that CMOs know AI is here to stay, and are trying out tools' uses for creativity in a bid to tackle their day-to-day challenges. But many remain unsure about what AI means for the industry, so their current cautious and experimental approach looks likely to linger.

TECH TRENDS: THE RISE OF AI

B2B V B2C - KEY DIFFERENCES

An almost equal share of **B2B-only** CMOs (69%) and **B2C-only** respondents (68%) are already using generative AI tools for marketing.

More than 3 in 5 (61%) employees at entirely **B2C** organisations are embracing AI with caution, compared to 44% of **B2C** CMOs who say this; and 41% of **B2B** business employees.

Since adopting AI, CMOs at purely **B2C** businesses are likeliest to cite higher-quality content as their main benefit (58%), while at entirely **B2B** organisations respondents most often highlight greater efficiencies for content generation (56%).

⁸ Adding 'fully or mostly hinders creativity'; 'not relevant to creativity'; and 'has no impact on creativity'

WHAT'S YOUR SKILLS STRATEGY?

We've already seen that finding the right balance of creativity and technology is a major challenge for CMOs.

In that context it's no surprise that when asked about the key skills they needed to add to their marketing team's armoury, respondents mention 'creativity and innovation' most often (40%).

The hunt for talent to handle both traditional and future-facing marketing strategy is intense: AI skills (39%) are also widely desired among CMOs, while the same share (39%) cite finding technical skills - such as digital marketing - as a priority.

In truth, CMOs want every skill they can add: knowledge of market research (32%), product marketing (31%) and social media (30%) are also high on their wish list.



What are the key skills you are looking for from marketing hires, if any?

Creativity and Innovation

40%

AI Skills

39%

Technical Skills (e.g. SEO, PPC)

39%

Tech Knowledge (Excluding AI)

36%

Marketing Research

32%

Product Marketing

31%

Social Media Knowledge

30%

Marketing Campaign Management

30%

Influencer Marketing (Ambassador/Influencer Relations)

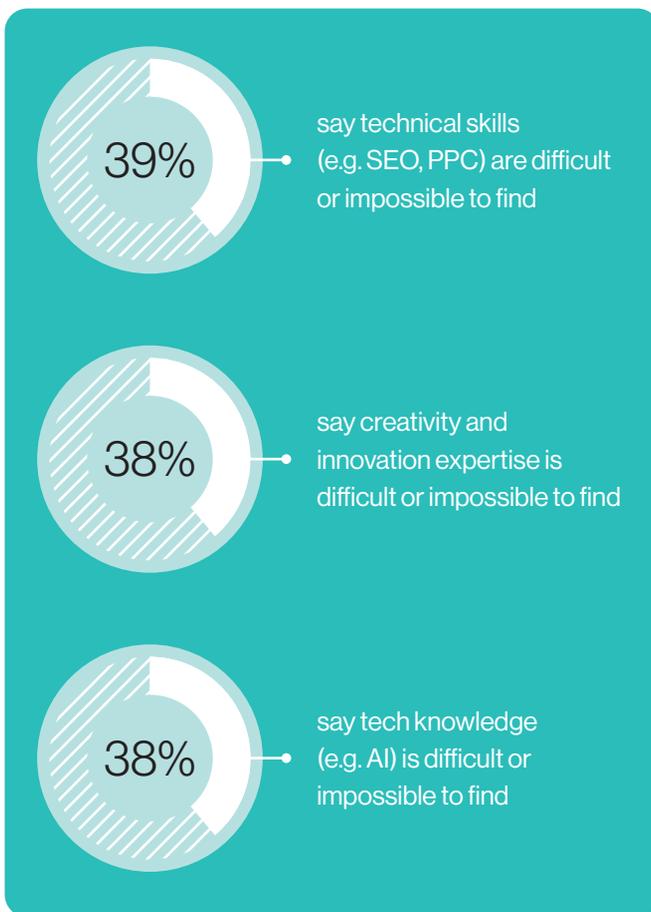
30%

Marketing Project Management

28%

FINDING TALENT IS NO MEAN FEAT

Tracking down the talent their teams need is proving tricky for CMOs. Frustratingly, the skills they most want to add also seem most difficult to find.



Almost 2 in 5 (38%) respondents claim creativity and innovation expertise is difficult or even impossible to pinpoint in the talent pool on offer. Even more (39%) of them rue how hard it is to find technical skills; while 38% struggle to appoint marketers with knowledge of technical aspects, such as AI.

At the other end of the spectrum the supply of social media talent seems healthy, with just over three quarters (76%) of CMOs saying it's easy to find these skills. There's also a rich vein of talent in product marketing (71%), market research (69%) and influencer marketing (69%).

Well over 250,000 people work in the UK marketing industry - a figure which is trending upwards and predicted to keep rising.

But the rapid increase in marketing technology and digital channels is fuelling the need for new skills, and finding the right talent isn't always simple. There's an emerging requirement to combine creative flair and analytical expertise which is proving hard to fulfil: these skills may not commonly be found in one employee.

Alongside meeting customer expectations and embedding cutting-edge tech like AI, developing teams to successfully manage a marketing revolution will be a huge challenge for CMOs going forward.

MEASURING MARKETING'S IMPACT

Of course, customers aren't the only cohort that CMOs need to satisfy. Demonstrating campaign impact and ROI remain critical to boardroom buy-in.

In many instances CMOs still have some way to go to win the backing of business leaders. They reveal a minority (43%) of stakeholders fully understand marketing's importance, so they have full buy-in. A further 33% of CMOs say their stakeholders somewhat understand the value of marketing, giving it partial buy-in.

But 12% reveal stakeholders don't understand marketing's importance, and that means getting buy-in is hard. More than 1 in 10 (11%) CMOs also state stakeholders' concept of 'good marketing' is not aligned with their own.

So, fewer than half of the CMOs surveyed believe they can confidently go full steam ahead with their plans. And that doubtless has an effect on budgetary decisions.

In fact, nearly 2 in 5 (39%) respondents claim they are 'having to do more with less'. This is leaving less room for manoeuvre and, in many cases, marketing strategies that are delayed or even scrapped.



40% of CMOs say budget is already 'saturated' with planned activity



38% bemoan constant decision-making to allocate a limited budget



36% state they do not have enough flexibility within the agreed budget

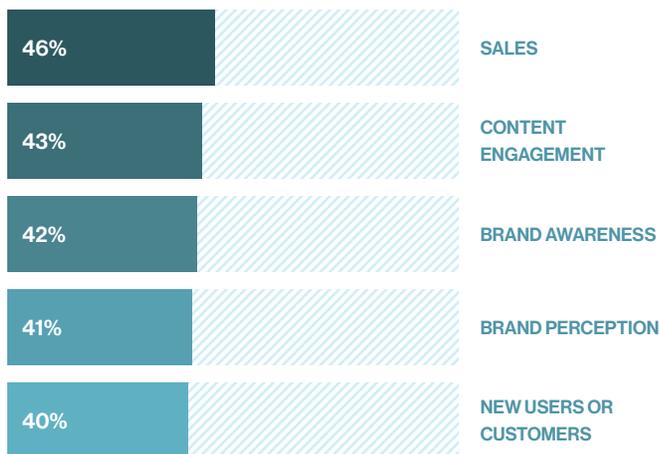
In addition, 1 in 3 (33%) respondents say their marketing budget isn't relative to their forecasts. This is frustrating - but could it be a problem with the measurement method?

PROVING CAMPAIGN SUCCESS

In terms of what they are measuring, most (46%) CMOs measure visibility of the cold, hard results of sales data.

They're also keen to understand consumer engagement with content (43%), while softer metrics including brand awareness (42%) and brand perception (41%) are also popular.

Top 5 metrics CMOs measure in their marketing:



Just 3% of CMOs don't measure the effectiveness of their marketing activity. Of those who do:



It's interesting to note that 47% of CMOs who say they measure effectiveness using market research also state stakeholders at their business are fully invested in the marketing strategy; whereas significantly fewer (38%) CMOs who don't employ market research enjoy complete boardroom backing.

As Sarah Byrne, Google UK&I director of sales for agency, succinctly told The Drum:



Measurement is like nutrition: you are what you eat. But it sounds easier than it is. Changing habits is hard, but it's easier with the right support around you.

In an era of change and difficult financial circumstances the ability to produce clear metrics that underline campaign ROI and effectiveness can be the difference between implementing fully funded, dynamic marketing plans and standing still.

WHAT'S YOUR SKILLS STRATEGY?

B2B V B2C - KEY DIFFERENCES

More than a third (34%) of CMOs at **B2C-only** organisations have difficulty accessing market research talent; the figure for **B2B** is 27%.

Almost 1 in 5 (18%) **B2C** marketers say their stakeholders do not understand the importance of marketing and it's hard to buy-in; this drops to 13% at **B2B** organisations.

51% of B2C-only CMOs compared to 35% of respondents at purely **B2B** businesses are having to 'do more with less budget'.

At **B2C** organisations, CMOs most frequently measure sales (51%), while the figure for **B2B** businesses is 38%; CMOs in these organisations focus on measuring brand awareness (45%) ahead of other metrics.



INNOVATORS VS. LATE ADOPTERS

To add depth to our analysis of tech adoption and how it affects specific aspects of marketing, we ranked respondents' organisations on a scale of 1 to 5, based on the extent to which they have implemented the following:

Generative AI

Traditional AI

Machine Learning

Digital Assets

Virtual Reality

For simplicity we then categorised each business as an **'Innovator'** - those adopting the most different types of technology - or **'Late adopter'**, those which have so far adopted the least.

LISTENING

Innovators are likelier, by a margin of 65% to 50% of Late adopters, to use qualitative marketing research to listen to their customers. For quantitative research the proportions are 59% and 42% respectively.

PRIORITIES

Innovators are less likely (24%) than Late adopters to (29%) to name attracting and retaining customers as a top challenge.

BRAND BACKLASH

Interestingly, Late adopters are much more likely (14%) to never feel concerned by this issue than their Innovator counterparts (5%).

AI CREATIVITY

More than half (54%) of the Innovators feel AI fully or mostly enables creativity, compared to 30% of Late adopters.

BUY-IN

Innovators are more likely (47%) than Late adopters (39%) to claim their stakeholders fully understand and buy into the importance of marketing.

BUDGETS

Innovators are more likely (38%) to say they have to do more with less than Late adopters (36%), possibly indicating the former group is using AI to offset budget difficulties.

MEASUREMENT

Overall, Innovators are more likely than Late adopters to measure all aspects of marketing.

KEY TAKEAWAYS

1

Consumers expect brands to reflect their values and behave accordingly. Having access to the right consumer insights, driven by techniques that include an ongoing market research programme, is vital to make your communications land in a way that avoids 'brand backlash', and builds trust and loyalty.

2

CMOs are enthusiastically experimenting with AI tools for marketing. But they're also refusing to get carried away about what they mean for creativity and their wider workforce. It's a sensible, step-by-step approach which should provide incremental improvements for marketing.

3

Finding the right talent for a tech-driven era of marketing has become one of the industry's greatest challenges. But CMOs understand what skills they need to add to their team to boost creativity, innovation and effectiveness, and are working hard to fill the gap.

4

CMOs know they must satisfy internal stakeholders as well as all-important customers. If you struggle to boost boardroom perceptions of marketing, you're not alone: over 1 in 10 CMOs claim it's hard to get buy-in for their plans as senior leaders don't understand marketing's value.

5

Many marketing measurement techniques are available to make their case, but CMOs name market research as one of the most effective methods. Using qualitative and quantitative methods to understand campaign impact is a proven way to help your senior stakeholders see the value of marketing: a powerful tool when it comes to agreeing budgets.

CONTACT CENSUSWIDE

London

A

12-14 Berry Street
London
EC1V 0AU

Bristol

A

The Pithay
Bristol
BS12NB

Glasgow

A

15 E Campbell Street
Glasgow
G15DT

New York

A

31 Howard Street Suite 5A
New York
NY 10013

WE'RE HERE TO HELP

GET IN TOUCH

The research consultants at Censuswide are here to help you uncover the insight you need to shape powerful marketing strategies and measure the impact of your campaigns.

We'd love to hear more about your business and future marketing plans.

Nicky Marks

Managing Director

Nicky@censuswide.com

Robin Smith

Head of Corporate

Rob@censuswide.com

Joey Green

Creative Director

joey@censuswide.com

