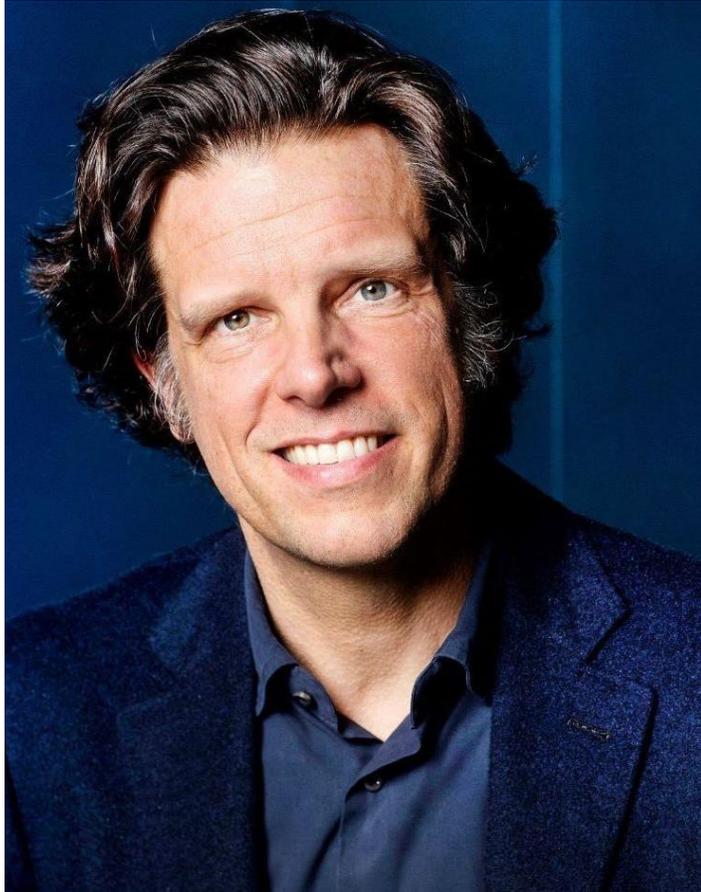


# BACK TO BRAND AND HEART

**WHAT WILL MOTIVATE AND INSPIRE MARKETING  
DECISION-MAKERS IN EUROPE IN THE COMING YEAR.**  
NOVEMBER 2022

# FOREWORD



Dear readers,

The uncertainties we are currently facing in the world are affecting us all – clients and agencies alike – and influencing the way we feel, think and act.

This isn't just the impression I have gained from the many talks I've had with business leaders, politicians and employees over the last few weeks and months; it can also be seen in the results of our annual CMO Barometer, a comprehensive survey of the leading marketing decision-makers in Europe.

The results show that in times of uncertainty, we are seeing a return to people and brands. Leading people and emotionally connecting them through brands is one of the central tasks of CMOs – both inwardly and outwardly. We are seeing a return of the “human factor” in communication, which is certainly a good thing in these current times.

I hope you enjoy discovering the results of our CMO Barometer 2023!

Florian Haller

# KEY LEARNINGS



**RECESSION, SUSTAINABILITY AND DEALING WITH UNCERTAINTIES WILL DEFINE THE AGENDA OF CMOS IN THE 2023 FINANCIAL YEAR.**



**SUSTAINABILITY WILL REMAIN *THE* MARKETING MEGATREND IN 2023. THERE IS A NEW FOCUS ON EMOTIONAL BRAND MANAGEMENT AND CONTENT CREATION.**



**MORE THAN EVER, CMOS ARE BECOMING PEOPLE MANAGERS: IN UNCERTAIN TIMES, WE NEED TO LEAD IN AN AGILE WAY AND TAKE PEOPLE ON AN EMOTIONAL JOURNEY WITH US, AS MANAGING CULTURE IN HYBRID WORKPLACES IS THE NEW BIG CHALLENGE.**



**EVEN IN TIMES OF CRISIS, CMOS ARE CONSISTENTLY DRIVING FORWARD THE DEVELOPMENT OF AN EXCELLENT CUSTOMER EXPERIENCE AND THE DIGITAL TRANSFORMATION.**



**FROM THEIR OWN ORGANISATION AND AGENCY PARTNERS, CMOS ARE EXPECTING AGILE AND FLEXIBLE COOPERATION MODELS.**





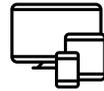
PHONE BOX

CMO BAROMETER 2023

**METHOD**



# STUDY PROFILE



## METHOD

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Online survey



## SAMPLE

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470 CMOs / marketing decision-makers  
in Europe: Germany: 186 | Austria: 21 |  
France: 36 | Italy: 50 | Netherlands: 33 |  
Belgium: 33 | Switzerland: 29 | UK: 82



## TIME PERIOD

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CW36 – CW38  
05.09.2022 – 21.09.2022



## DURATION

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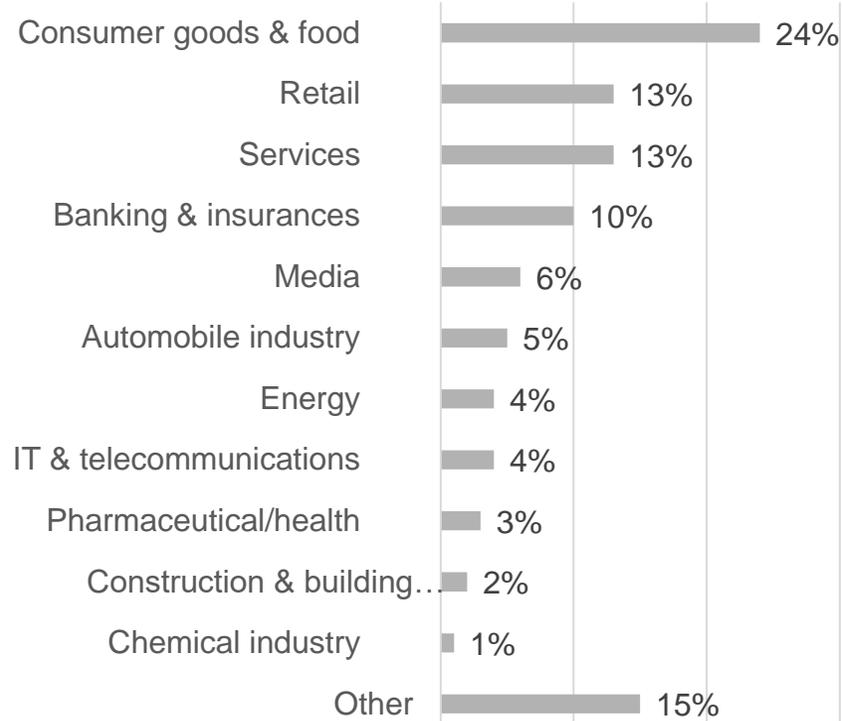
Survey duration  
approx. 9 minutes per person



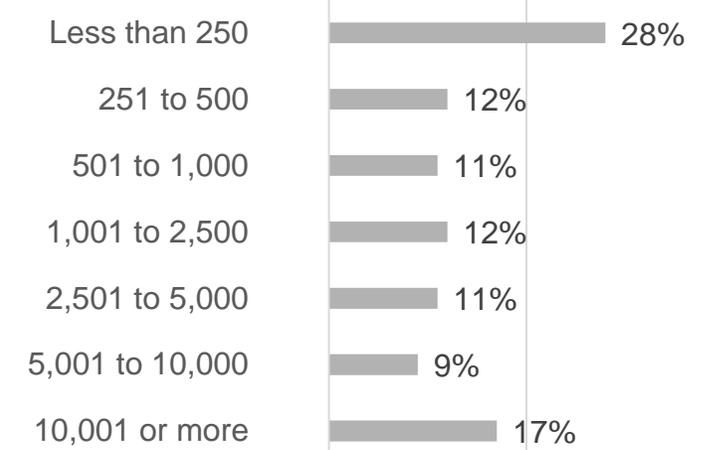


# SAMPLE DESCRIPTION

## SECTOR



## COMPANY SIZE



Basis: n=470 surveyed CMOs in Europe (Germany: n=186 | Austria: n= 21 | France: n= 36 | Italy: n= 50 | Netherlands: n= 33 | Belgium: n= 33 | Switzerland: n= 29 | UK: n= 82)





# RESEARCH QUESTIONS

- 1** In your opinion, what is the **hot topic** for the marketing year of **2023**?
- 2** How important do you think the following **marketing trends** will be in **2023**?
- 3** **What's your superpower?** Which capabilities and skills does a CMO need to have these days to make their organisation fit for the future?
- 4** Which of the **"typical" CMO tasks** listed below will become more important in 2023?
- 5** As a CMO, what has been your **biggest lesson learned from the past few years** beset by a pandemic, war and uncertainty?
- 6** What kind of **inspiration do you expect from your agency partners** in uncertain times like these? What skills should an agency have these days?



CMO BAROMETER 2023

# RESULTS



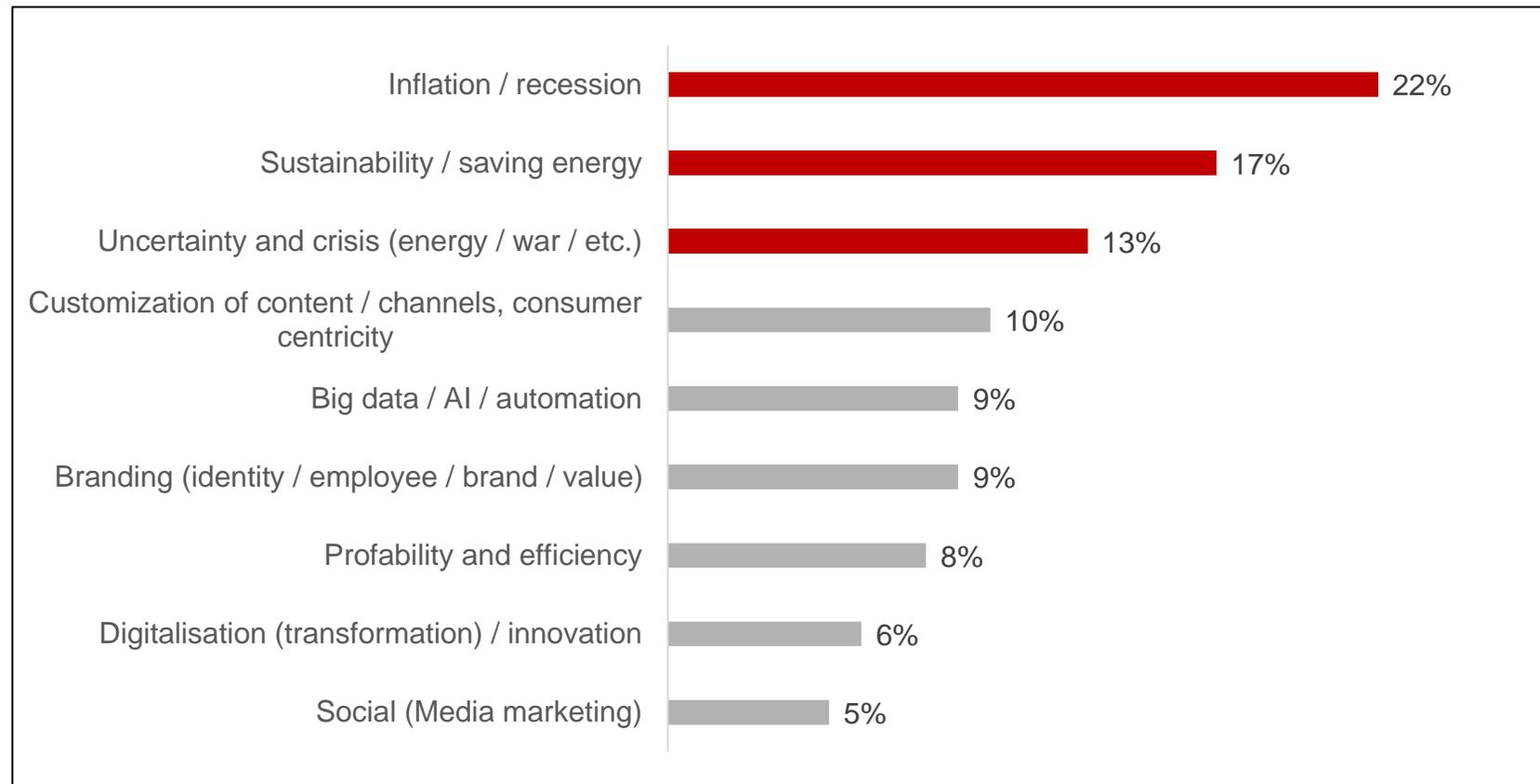
# 1

**IN YOUR OPINION, WHAT IS THE HOT  
TOPIC FOR THE MARKETING YEAR OF  
2023?**



# RECESSION, SUSTAINABILITY AND DEALING WITH UNCERTAINTIES WILL DEFINE THE AGENDA OF CMOs.

**In your opinion, what is the hot topic for the marketing year of 2023?**



Basis: Top unprompted responses from n=470 surveyed CMOs in Europe (Germany: n=186 | Austria: n= 21 | France: n= 36 | Italy: n= 50 | Netherlands: n= 33 | Belgium: n= 33 | Switzerland: n= 29 | UK: n= 82)



# WHAT THE CMOS ARE SAYING



“ We are moving from a supply crisis to a demand crisis. Skyrocketing energy costs are not only driving up material costs in the manufacturing sector, but also making consumers increasingly worried that they will lose their hard-earned wealth. The year 2023 will certainly be a very challenging one for marketing decision-makers. Long-term issues like sustainability need to remain on the agenda, paired with messages that less consumption also costs less. ”

---

**Christian Tauer**

Consumer Experience Director  
for Europe, BSH Home  
Appliances Group



# 2

**HOW IMPORTANT DO YOU THINK THE  
FOLLOWING MARKETING TRENDS WILL  
BE IN 2023?**



# IN ADDITION TO THE FOCAL TOPIC OF SUSTAINABILITY, EMOTIONAL BRAND MANAGEMENT AND CONTENT CREATION ARE CELEBRATING A COMEBACK.

**How important do you think the following marketing trends will be in 2023? Please rate their importance.**

## TOP 5

2022	Top2	2023	Top2
<b>1</b> Sustainability communication	<b>90%</b>	<b>1</b> Sustainability	<b>85%</b>
<b>2</b> Data-driven marketing	<b>86%</b>	<b>2</b> Emotional brand building	<b>83%</b>
<b>3</b> Digital transformation	<b>85%</b>	<b>3</b> Content creation	<b>75%</b>
<b>4</b> Customer experience	<b>84%</b>	<b>4</b> Connected commerce / e-commerce	<b>71%</b>
<b>5</b> Online/e-commerce	<b>80%</b>	<b>5</b> AI & automation	<b>65%</b>

Basis: 2023: n=470 surveyed CMOs in Europe (Germany: n=186 | Austria: n= 21 | France: n= 36 | Italy: n= 50 | Netherlands: n= 33 | Belgium: n= 33 | Switzerland: n= 29 | UK: n= 82) | 2022: n= 288, limited comparability with the previous year due to changing topics



# WHAT OUR EXPERTS ARE SAYING.



“ From the bottom of my heart, I call on all managers to have no fear! Because you know what? Even if we need to develop new business models, we don't focus on a niche when we talk about sustainability! And we don't do risk investment either! Sustainability is the megatrend of the decade. And even if the people around you are still regarding it as a secondary concern, the entire market and its capital streams have already turned in this direction. ”

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**Stefanie Kuhnhen**  
Chief Strategy Officer,  
Serviceplan Group



# 3

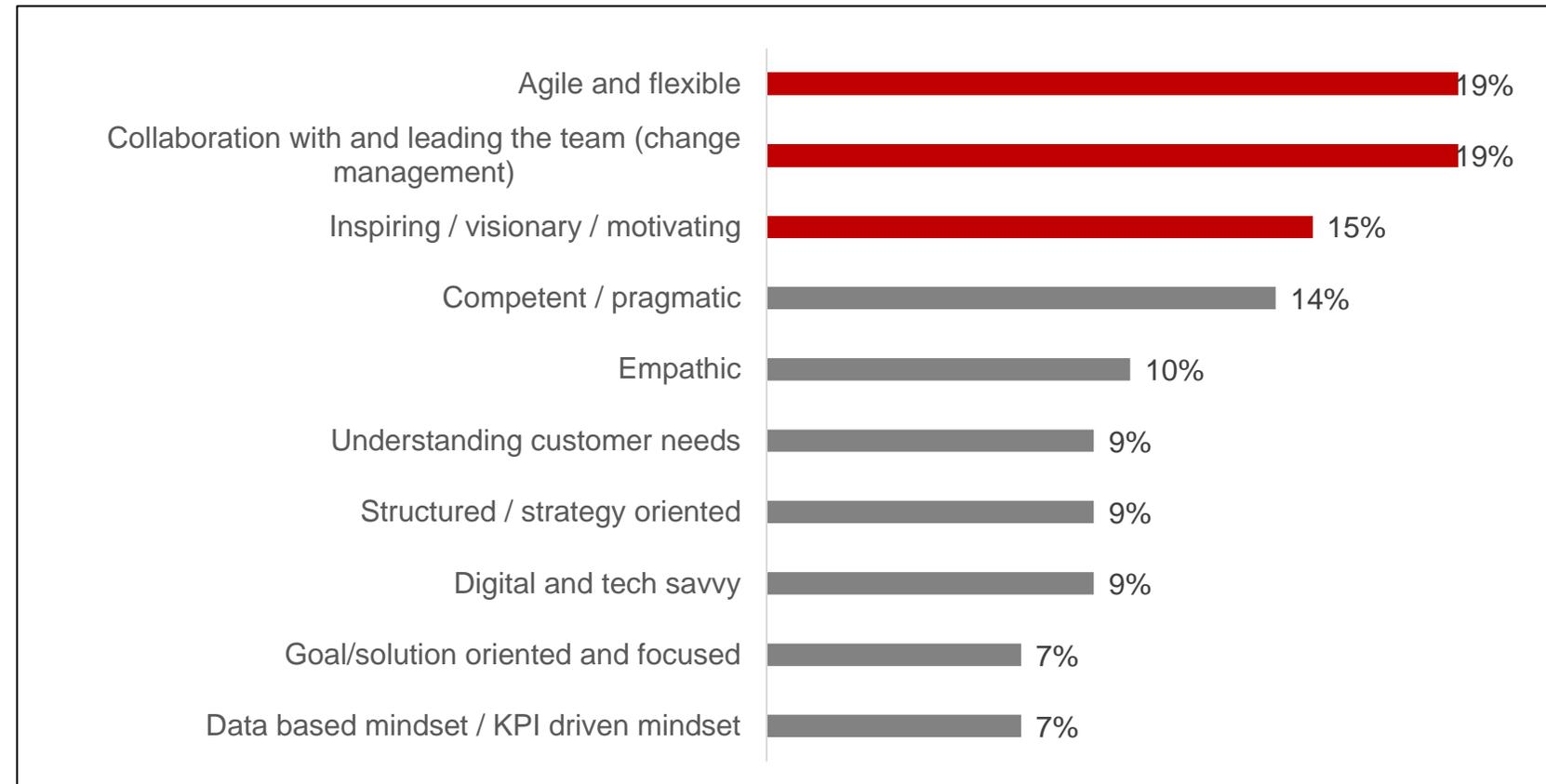
# **WHAT'S YOUR SUPERPOWER?**

WHICH CAPABILITIES AND SKILLS DOES A CMO NEED TO HAVE THESE  
DAYS TO MAKE THEIR ORGANISATION FIT FOR THE FUTURE?



# CMOS AS PEOPLE MANAGERS: MANAGE IN AN AGILE WAY, FACILITATE CHANGE AND INSPIRE AS SUPERPOWERS.

**What's your superpower? Which capabilities and skills does a CMO need to have these days to make their organisation fit for the future?**



Basis: Top unprompted responses from n=470 surveyed CMOs in Europe (Germany: n=186 | Austria: n= 21 | France: n= 36 | Italy: n= 50 | Netherlands: n= 33 | Belgium: n= 33 | Switzerland: n= 29 | UK: n= 82)



# WHAT THE CMOS ARE SAYING



“ Superpower: team-building and motivation. Putting together a good team is more important for CMOs than ever before. Getting new, good people on board is difficult, but the current framework conditions are not ideal. This makes it all the more important to believe in the vision / mission as a team and work on it in a solution-oriented, creative way. ”

---

**Christine Wolburg**

Head of Sales & Marketing, BVG



# 4

**WHICH OF THE “TYPICAL” CMO TASKS  
WILL BECOME MORE IMPORTANT IN  
2023?**



# CUSTOMER EXPERIENCE AND CULTURE IN HYBRID WORKPLACES ARE THE MOST IMPORTANT TASKS FOR 2023.

Which of the “typical” CMO tasks listed below will become more important in 2023?

2023	Average values
<b>1</b> Developing an excellent customer experience	<b>1.70</b>
<b>2</b> Encouraging team spirit and culture in hybrid teams	<b>1.79</b>
<b>3</b> Consistently driving forward the digital transformation	<b>1.82</b>
<b>4</b> Defining the brand purpose and making it tangible for the organisation and customers	<b>1.82</b>
<b>5</b> Anticipating market trends early on and translating them into pilot projects	<b>1.89</b>
<b>6</b> Developing customer loyalty (e.g., using first-party data to engage customers)	<b>1.95</b>
<b>7</b> Increasing marketing efficiency	<b>1.96</b>
<b>8</b> Creating an infrastructure, resources and process for data-driven marketing	<b>1.97</b>
<b>9</b> Making the marketing organisation flexible and crisis-proof (e.g., building up resources at short notice by outsourcing)	<b>1.98</b>
<b>10</b> Taking responsibility for the development of new business models	<b>2.11</b>

Basis: n=470 surveyed CMOs in Europe (Germany: n=186 | Austria: n= 21 | France: n= 36 | Italy: n= 50 | Netherlands: n= 33 | Belgium: n= 33 | Switzerland: n= 29 | UK: n= 82 | 2022: n= 288) | Scale of 1 = “will greatly increase in importance” to 5 = “will greatly decrease in importance”



# WHAT OUR EXPERTS ARE SAYING.



“ Topics like sustainability and recession are currently overshadowing the major issues of the past few years. But developing an outstanding and consistent customer experience and consistently implementing the digital transformation have not become any less important. Our task now is to align these topics with sustainability initiatives and recession measures. ”

---

**Dr Bastian Dinter**  
General Manager,  
Serviceplan Consulting Group



# 5

**AS A CMO, WHAT HAS BEEN YOUR BIGGEST  
LESSON LEARNED FROM THE PAST FEW  
YEARS BESET BY A PANDEMIC, WAR AND  
UNCERTAINTY?**



# THE CMOS AGREE: AGILITY AND FLEXIBILITY ARE THE SUCCESS FACTORS IN UNCERTAIN TIMES.

**When crisis mode becomes the norm: As a CMO, what has been your biggest lesson learned from the past few years beset by a pandemic, war and uncertainty?**



Basis (optional question): Top unprompted responses from n=415 surveyed CMOs in Europe (Germany: n=178 | Austria: n= 21 | France: n= 34 | Italy: n= 50 | Netherlands: n= 32 | Belgium: n= 31 | Switzerland: n= 28 | UK: n= 41)



# WHAT THE CMOS ARE SAYING



“ Flexibility is a competitive edge: planning cycles need to be dramatically shortened and alternative courses of action need to be considered from the outset. ”

---

**Steve Plesker**

Managing Director Marketing & Sales,  
AOK Bundesverband



# WHAT THE CMOS ARE SAYING



“ It’s better to react quickly and well  
than slowly and perfectly. ”

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**Christopher Huesmann**

Co-Founder & Co-CEO, Flaschenpost



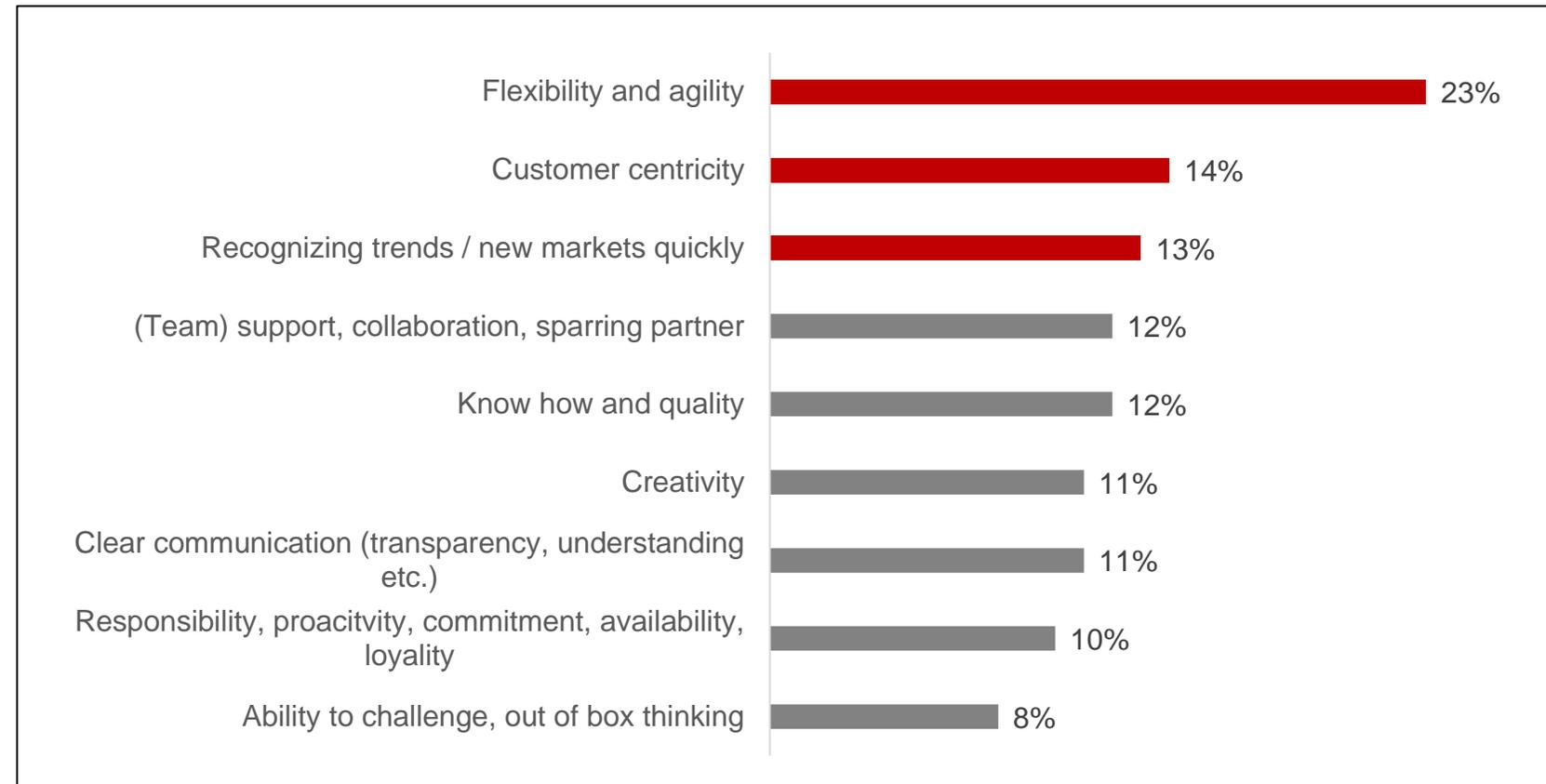
# 5

**WHAT KIND OF INSPIRATION DO YOU EXPECT FROM YOUR AGENCY PARTNERS IN UNCERTAIN TIMES LIKE THESE? WHAT SKILLS SHOULD AN AGENCY HAVE THESE DAYS?**



# CMOS EXPECT FLEXIBLE AND AGILE APPROACHES IN THEIR COLLABORATION WITH AGENCY PARTNERS.

**What kind of inspiration do you expect from your agency partners in uncertain times like these? What skills should an agency have these days?**



Basis (optional question): Top unprompted responses from n=391 surveyed CMOS in Europe (Germany: n=168 | Austria: n= 19 | France: n= 35 | Italy: n= 50 | Netherlands: n= 28 | Belgium: n= 27 | Switzerland: n= 23 | UK: n= 41)



# WHAT THE CMOS ARE SAYING



“ Speed is paramount for us. Due to our high internal agility, speed has taken on even more of a decisive role. The ability to understand the internal processes of a customer and act accordingly is, from our point of view, more crucial than ever. ”

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**Marco Raab**  
Chief Brand Officer, yfood



# THE UK IS UNDERREPRESENTED IN THE TOP 3 TOPICS, BUT IT DOES ALREADY HAVE A STRONG FOCUS ON THE METAVERSE & CO.

**What kind of inspiration do you expect from your agency partners in uncertain times like these? What skills should an agency have these days?**

TOP 2 Sorted by overall	Germany n=186	Austria n=21	France n=36	Italy n=50	Netherlands n=33	Belgium n=33	Switzerland n=29	UK N=82	Overall N=470
Sustainability	83.9%	90.5%	94.4%	90.0%	90.9%	87.9%	96.6%	70.7%	85%
Emotional brand building	85.5%	85.7%	88.9%	88.0%	87.9%	81.8%	82.8%	67.1%	83%
Content creation	75.3%	90.5%	69.4%	78.0%	81.8%	78.8%	82.8%	64.6%	75%
Connected commerce/ E-commerce	68.3%	61.9%	69.4%	66.0%	78.8%	84.8%	75.9%	73.2%	71%
AI & automation	63.4%	66.7%	52.8%	70.0%	63.6%	66.7%	82.8%	65.9%	65%
Global sourcing & supply chain management	61.8%	57.1%	58.3%	70.0%	60.6%	69.7%	62.1%	63.4%	63%
Diversity, equality & inclusion	55.4%	66.7%	69.4%	68.0%	69.7%	66.7%	55.2%	68.3%	62%
Cookieless marketing & first-party data	63.4%	66.7%	55.6%	62.0%	66.7%	60.6%	58.6%	54.9%	61%
Dynamic pricing	53.2%	61.9%	63.9%	74.0%	60.6%	63.6%	48.3%	64.6%	60%
Metaverse, NFTs & Co.	29.0%	33.3%	30.6%	38.0%	30.3%	42.4%	24.1%	58.5%	36%
Gaming	32.3%	38.1%	22.2%	42.0%	30.3%	18.2%	27.6%	39.02%	33%

Basis: n=470 CMOs surveyed overall  
TOP 2: Summary of categories 1 – Very important and 2 – Somewhat important.

■ = Overrepresented, > 10pp  
■ = Underrepresented, < 10pp





CMO BAROMETER 2023

# ABOUT THE STUDY

# ABOUT THE SERVICEPLAN GROUP & THE CMO BAROMETER

- » The Serviceplan Group is the largest independent, partner-managed agency group in Europe.
- » Established in 1970 as a classic advertising agency, Serviceplan soon developed its House of Communication concept – to date, the only completely integrated agency model in Europe to unite all modern communication disciplines under one roof: Creative & Content, Media & Data and Experience & Commerce.
- » With 23 of its own office locations and a number of other partnerships, the Serviceplan Group is represented in a total of 16 countries worldwide and all the important economic regions.

The CMO Barometer is an annual study that surveys top marketers from the most important companies in the D-A-CH region and another seven countries. This is the fourth time it has been conducted by the Serviceplan Consulting Group and Facit.



# WHAT OUR EXPERTS ARE SAYING.



“ The human factor is back and social competence is currently more sought-after than ever – especially in combination with optimism, positivity and empathy in order to keep up the team spirit. CMOs are being challenged on all levels, but, at the end of the day, the most important basis for success is a motivated and trustworthy team. ”

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**Yvonne Wicht**  
Chairwoman of CMO of the Year Council,  
Serviceplan Group



# PRESS CONTACT



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